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IL OF THE
GREAT BEAR STUDY

EXECUTIVE SUMMARY

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Alberta
TOURISM

Office of the Deputy Minister

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The following Executive Summary provides an overview of the report Trail of the Great Bear Study. The report provides information on the Trail of the Great Bear Concept, which proposes to establish an international scenic touring corridor that links the world's first national park, Yellowstone, to the world's first international peace park, Waterton-Glacier, to Canada's first national park, Banff.

It should be noted that the study was conducted by an independent consultant, and was funded through the Canada/Alberta Tourism Agreement and the State of Montana. As such, this study does not represent the policies of the respective governments, nor does it imply any commitment to implementation. It is anticipated that implementation will be co-ordinated and lead by the Trail of the Great Bear Tourist Society.

If you have any comments relative to the report, please forward them to either:

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Comments concerning implementation activities should be forwarded to the Trail of the Great Bear Society, c/o Ms. Beth Russell, Box 142, Waterton, Alberta Canada, TOK 2MO, telephone - (403) 859-2663.

Additional copies of this report are available by contacting the Society.

Sincerely,

Bernard F. Campbell
Deputy Minister
Alberta Tourism

Sandra Guedes
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TRAIL OF THE GREAT BEAR

EXECUTIVE SUMMARY

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TRAIL OF THE GREAT BEAR

EXECUTIVE SUMMARY

1.0 Introduction

As the world's interest in preserving and maintaining environmental, cultural and social values grows, tourism concepts which conserve these resources, such as ecotourism or "green" tourism, are receiving increased attention as viable economic alternatives. In support of this interest, Alberta Tourism and Travel Montana commissioned the Calgary firm of Pannell Kerr Forster in 1989 to undertake an assessment of the potential for a tourism product originally identified by the Trail of the Great Bear Society, which could fulfil this role.

This tourism concept involves the establishment of an international scenic corridor which would span Alberta and Montana. It would perpetuate and commemorate cultural, wildland and national park values and further an appreciation and understanding of them, through promotion of appropriate recreation and tourism uses. The proposed corridor would link the world's first national park, Yellowstone, to the world's first international peace park, Waterton/Glacier to Canada's first national park, Banff. The name selected to represent the vast region it would traverse was the Trail of the Great Bear.

2.0 The Trail of the Great Bear

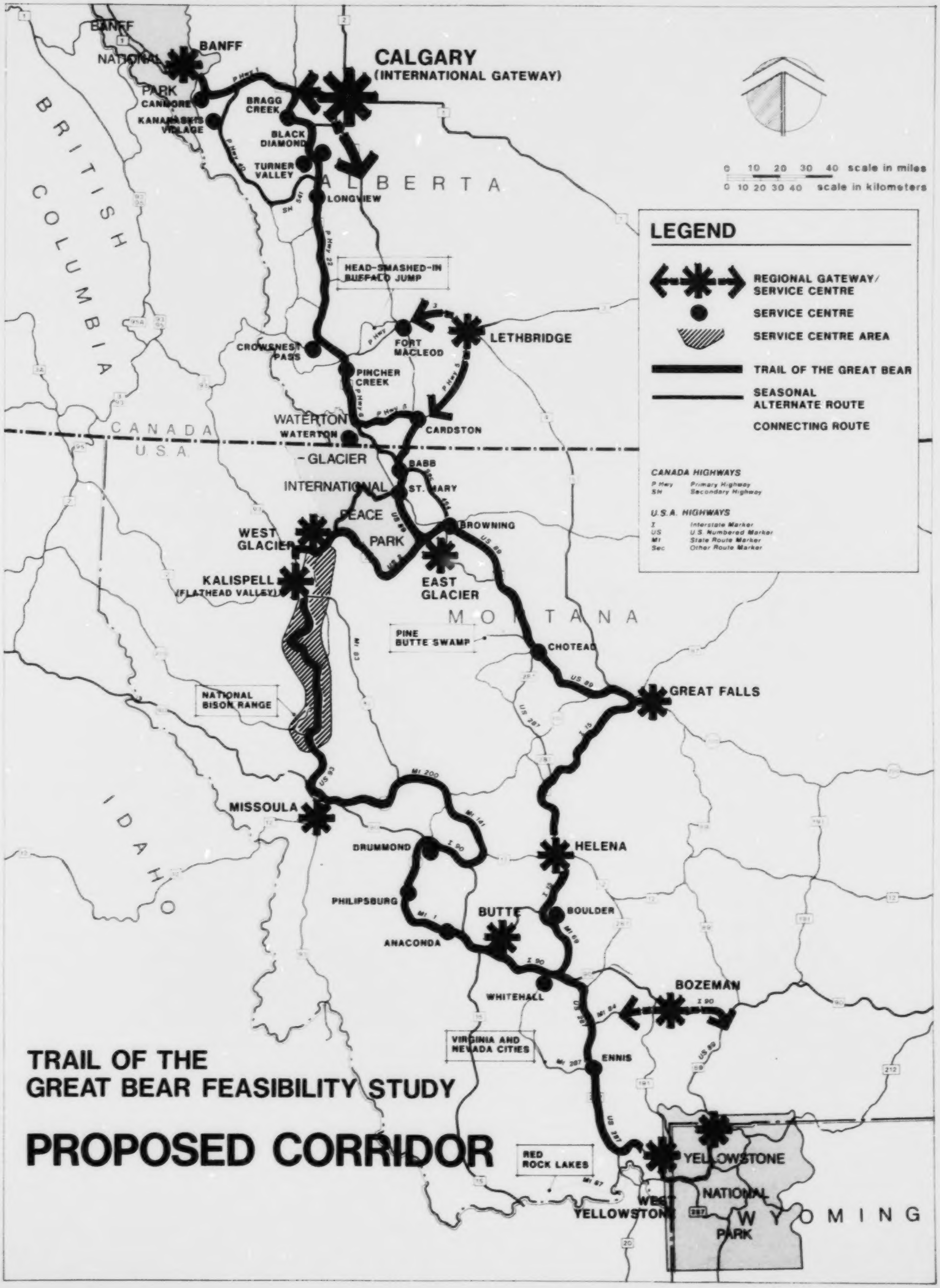
The Trail of the Great Bear spans 2,085 miles or 3,350 kilometres in two countries. It consists of a system of roads which traverses an international border and links four significant national parks: Yellowstone and Glacier in the United States, and Waterton and Banff in Canada.

In addition to the significant resources found in the four national parks, the corridor offers an exceptional variety of natural, cultural/historic and tourism resources along the Trail of the Great Bear. These resources, outside of the parks, have only recently begun to be identified and considered for promotion in national and international markets. Many of the resources have the potential to draw visitors from the national parks or divert them from parks which are currently overcrowded at various periods of the year. While easing the pressure on the parks, the Trail will assist in further distributing the economic impact of that visitation to a broader region along the Trail. Many sections of the Trail lend themselves to four season travel and provide winter attractions. Major themes exist which make the Trail of the Great Bear unique in the world. These themes include: wildlands and wildlife, major ecosystems, native, historic, cultural and settlement themes.

In many parts of the world, where preserved wildlands exist in the condition of those found along the Trail, they are difficult to access, and where they are easily accessible, they have not been preserved. In this regard, the Trail of the Great Bear is unique, offering both pristine wildland and accessibility to protected areas.

The proposed Trail of the Great Bear Corridor is shown on the following map. The Trail includes connecting routes which permit the Trail to be connected to major gateways, and/or to attractions of particular interest. Seasonal alternate routes have been identified which enhances the Trail during the summer season or compensates for roads which are closed in the winter. Gateways to the Trail of the Great Bear from major sources of markets are strategically located throughout its length. Gateways are an important part of a tour system and are areas with a concentration of significant visitor services which may include major airports or transportation facilities. Gateways are major access and transition points within and into the corridor. In addition, the Trail of the Great Bear is well provided with service centres. These are defined as areas where some or all visitor amenities such as food service facilities, gasoline and car service and accommodation may be available, so that travellers are never more than a one hour drive from services.

The selected roads are in satisfactory condition and with the completion of current paving programs in Alberta, the entire Trail will be located on paved highway.



TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

PROPOSED CORRIDOR

BANFF NATIONAL PARK
BANFF
CALGARY (INTERNATIONAL GATEWAY)
CANMORE
KANANASKIS VILLAGE
BRAGG CREEK
BLACK DIAMOND
TURNER VALLEY
LONGVIEW
ALBERTA
BRITISH COLUMBIA
HEAD-SMASHED-IN BUFFALO JUMP
LETHBRIDGE
FORT MACLEOD
CROWSNEST PASS
PINCHER CREEK
WATERTON
CARDSTON
CANADA
U.S.A.
WATERTON - GLACIER INTERNATIONAL PEACE PARK
BABB
ST. MARY
BROWNING
WEST GLACIER
EAST GLACIER
KALISPELL (FLATHEAD VALLEY)
MONTANA
PINE BUTTE SWAMP
CHOTEAU
NATIONAL BISON RANGE
GREAT FALLS
IDAHO
MISSOULA
DRUMMOND
HELENA
PHILIPSBURG
BUTTE
BOULDER
ANACONDA
WHITEHALL
BOZEMAN
VIRGINIA AND NEVADA CITIES
ENNIS
RED ROCK LAKES
WEST YELLOWSTONE
YELLOWSTONE NATIONAL PARK
WYOMING
P Hwy 1
P Hwy 22
SH 541
P Hwy 3
P Hwy 5
P Hwy 6
US 89
US 2
US 93
US 287
I 15
MI 200
MI 141
I 90
MI 1
MI 69
MI 84
MI 287
MI 87
0 10 20 30 40 scale in miles
0 10 20 30 40 scale in kilometers
LEGEND
REGIONAL GATEWAY/ SERVICE CENTRE
SERVICE CENTRE
SERVICE CENTRE AREA
TRAIL OF THE GREAT BEAR
SEASONAL ALTERNATE ROUTE
CONNECTING ROUTE
CANADA HIGHWAYS
P Hwy Primary Highway
SH Secondary Highway
U.S.A. HIGHWAYS
I Interstate Marker
US U.S. Numbered Marker
MI State Route Marker
Sec Other Route Marker

3.0 Trail of the Great Bear: Philosophy and Concept

The philosophy of the Trail of the Great Bear is to commemorate and perpetuate cultural, wildland and national park values and to further an appreciation and an understanding of these values through promotion of appropriate recreation and tourism uses associated with them. The concept of the Trail of the Great Bear is to link Yellowstone, the world's first national park through the world's first international peace park, Waterton/Glacier, to Canada's first national park, Banff. The concept encourages recreation and tourism uses, and developments and services that are compatible with, and promote a greater understanding of existing natural, historical and cultural resources and values, while recognizing that a healthy and economically viable tourism industry is essential to support these aims.

4.0 Trail of the Great Bear: Goals and Objectives

The goals of the Trail of the Great Bear are to:

- promote and perpetuate cultural, wildland and national park values;
- further an appreciation and understanding of these values;
- encourage the development of an economically viable tourism industry that recognizes, encourages and supports a mutually beneficial relationship between resource integrity and tourism use;
- increase tourism benefits to the region through the implementation of the Trail of the Great Bear concept;
- increase economic impacts to the region through tourism developments and activities that reflect the Trail of the Great Bear philosophy;
- develop the Trail of the Great Bear route as an international corridor with a high quality recreation/vacation experience.

From these goals the following objectives have been derived:

- to develop a tourism corridor offering access, interpretation and education for wildlands, wildlife and historical and cultural attractions within its boundary;
- to design the corridor so that it links Banff National Park, Waterton/Glacier International Peace Park and Yellowstone National Park;
- to provide the opportunity for development of environmentally sensitive, sustainable tourism products, facilities and services congruent with the philosophy of the Trail of the Great Bear;
- to develop a concept that appeals to, and can be practically utilized by, broad market segments.

5.0 Achieving Goals and Objectives

Consideration must be given to various aspects in order to achieve the Trail of the Great Bear goals and objectives as an ecotourism concept.

To attract national and international tourism markets, the Trail of the Great Bear tourism destination product must fulfil the needs and perceptions of visitors. These needs include basic visitor amenities such as food and shelter as well as satisfying the reasons for choosing a destination which includes natural and man made attractions, recreation opportunities, cultural and historic educational experiences and opportunities for relaxation. In addition, it is paramount that the product be accessible to the market. The Trail of the Great Bear meets all of the aforementioned requirements while at the same time allowing opportunity for expansion and/or development. Some road infrastructure requirements, such as signing and pulloffs will be necessary. Loop tours will allow visitors with limited vacation time to experience the Trail, and will assist in redistributing visitation from highly used areas to less crowded areas.

Also of importance is the support and adherence to the philosophy of the Trail of the Great Bear. In this regard a process must be established for addressing environmental concerns with local communities, environmental groups and agencies so that potential problems are identified and resolutions made before they become issues.

By providing a networking and implementation system for agencies, associations and individuals charged or concerned with environmental protection and sustainable use, the Trail of the Great Bear could serve as a model in ecotourism.

The Trail of the Great Bear is a long term project; some corridors have taken up to 50 years to reach their potential. The pace of development will depend on many future events and factors including: community involvement, marketing and promotion programs, and the level of acceptance and interest of the markets to the product.

While support in principle for the Trail of the Great Bear has been expressed by various government agencies, corporate stakeholders and private stakeholders, commitment by any individual or agency regarding financial support for the project and its implementation has yet to be determined.

6.0 The Markets

Tables 6-1 and 6-2 present both the existing and potential market segments for the proposed corridor by geographic origin.

TABLE 6-1

EXISTING MARKET SEGMENTATION BY GEOGRAPHIC ORIGIN FOR PROPOSED CORRIDOR IN RANK ORDER*

Market Type	Alberta	Montana
Primary	• Alberta • Montana • British Columbia • Saskatchewan	• Montana • Alberta • Pacific Coast States • Mountain States • North Central State
Secondary	• Other Canada • Other United States	• Other United States • Other Canada
Tertiary	• Japan • United Kingdom • Germany • Other Overseas	• United Kingdom • Germany • Japan • Other Overseas

Source: Pannell Kerr Forster research

Note: Primary markets represent the strongest existing markets to the proposed corridor area and the province/state. Secondary and tertiary markets represent more long term markets to be developed for the corridor area.

* The existing market segments were rank ordered in terms of the current size of the market visiting Alberta and Montana.

TABLE 6-2

POTENTIAL MARKET SEGMENTATION BY GEOGRAPHIC ORIGIN FOR PROPOSED CORRIDOR IN RANK ORDER*

Market Type	Alberta	Montana
Primary	• Montana • British Columbia • Saskatchewan	• Alberta • Pacific Coast States • Mountain States • North Central States
Secondary	• Germany • Japan • United Kingdom	• Germany • United Kingdom • Japan
Tertiary	• Other Canada • Other United States • Other Overseas	• Other United States • Other Canada • Other Overseas

Source: Pannell Kerr Forster research

Note: The identification of potential market segments has concentrated on the non-resident markets since they will generate new revenues into the province/state. The selection of these target markets takes the long term growth of this project into consideration.

* The potential market segments were evaluated based on a number of criteria including length of stay, expenditures, origin, size of the market, seasonality, trip purpose and mode of transport.

It is recognized that resident travel markets will be especially important to the proposed concept to stop tourism revenue leakages from outside of the province/state, and for the initial/short term marketing of the concept. Increased cross border visitation between the province and state should also occur. Over the long term the overseas markets, and more specifically those seeking "culture and nature" as a travel motivator, should be targeted.

While segmentation by geographic origin provides some insight into the characteristics of potential markets, a division of markets by their actual trip purpose and/or mode of transport enhances the understanding of the Trail of the Great Bear traveller. The most viable potential markets are presented in Table 6-3.

TABLE 6-3

MARKET SEGMENTATION BY TRIP PURPOSE/ MODE OF TRANSPORT

Trip Purpose	Mode of Transport
1) National Parks	1) Private Automobile
2) Special Interest Groups	2) Recreational Vehicle-owner
3) Attractions/Special Events	3) Fly and Drive
4) Visiting Friends and Relatives	4) Recreational Vehicle-rental
5) Short Getaway	5) Motor Coach Tours
6) Group Touring	

Source: Pannell Kerr Forster research

The table reveals that national park visitors and special interest groups offer strong potential for the Trail given their strong focus on natural features. The private automobile touring market represents a large and distinct group of travellers; a proportion of whom could experience their holiday along the Trail.

In terms of visitation projections, the proposed concept would draw from two sources: existing visitors to Alberta and Montana and new visitors to the corridor area. The incremental visitations were analyzed separately for the Alberta and Montana portions of the route and resulted in these visitation figures:

1)	Potential (long term) incremental visitation to Alberta	879,850
2)	Potential (long term) incremental visitation to Montana	598,380
	Total Annual Incremental Visitations	1,478,230

The potential new visitations for the entire route were estimated separately for North America and for the overseas markets and resulted in these visitation figures:

1)	Potential new visitations (long term) from North America	233,851
2)	Potential new visitations (long term) from overseas	29,500
	Total Annual Potential New Visitations	263,351

These projected visitation figures were derived from existing visitation statistics to Alberta and Montana, the population base of various regions, the potential market travel segment from overseas areas, and their respective estimated capture ratios.

7.0 Economic Impact

The potential economic impact estimation of the proposed Trail of the Great Bear on Alberta and Montana used an economic impact model and approach. Highways are normally categorized as infrastructure, and not tourism generators. In the case of a scenic touring highway, however, the highway itself creates the access to the tourism opportunities, and becomes part of the tourism generator.

The economic impact on Alberta and Montana was assessed independently, using the same methodology. Some of the general assumptions made for the economic impact analysis include:

- Visitation estimates are based upon a fully developed Trail, which could take up to 50 years. While it is recognized that resident markets will assist in stopping tourism revenue leakages outside the province or state, this analysis is limited to **non-resident** markets since they will generate new revenues.

- All dollar figures are identified as 1990 Canadian or U.S. dollars.

- Capital and operating costs relate to signage, roadside pulloff construction and maintenance and are above those that currently exist. The proposed signing and roadside pulloff construction costs should be considered as basic in scale and scope. The costs of road improvements and/or construction of access roads have not been considered in the analysis.

- The impact of recreational opportunities relate to the longer term growth of the region as a destination and cannot be accurately estimated at this time. As such, their impact has not been considered in this analysis.

- The route length assessment (one way) for Alberta is 770 kilometres (480 miles) and for Montana is 2,580 kilometres (1,605) miles.

- Private costs related to the construction and operation of tourism services and facilities have been termed as "induced private sector facilities". Private sector investment will be the result of demand for, and profitability of those services and facilities.

The projected economic impacts (based upon full development and a stabilized year) for Alberta and Montana are as follows:

1. The one-time capital cost impacts to Alberta are projected at $0.48 million (Cdn.), for signing and pulloffs, and $16.5 million (Cdn.) for induced private sector facilities. The capital costs for Montana are projected at $0.78 million (U.S.) for signing and pulloffs, and $21.1 million (U.S.) for induced private sector facilities. The capital costs for Montana will be higher due to a major portion (4/5^{ths}) of the Trail situated in the state.

2. Annual operating cost impacts for Alberta are projected at $0.3 million (Cdn.) for highway maintenance and $2.3 million (Cdn.) for induced private sector facilities. Annual operating cost impacts for Montana are projected at $0.56 million (U.S.) for highway maintenance, and $2.4 million (U.S.) for induced private sector facilities.

3. The projected incremental annual visitation (non-resident person day visits) is projected at 1,666,347 for Alberta and 1,207,645 for Montana.

4. Estimated annual direct expenditures (by non-residents) for Alberta is $51.9 million (Cdn.) and $26.2 million (U.S.) for Montana.

5. The annual income impact on the region for Alberta is projected at $86.5 million (Cdn.) and for Montana at $58.5 million (U.S.).

6. The annual employment impact on the region (person years) is projected at 1,802 for Alberta and 1,359 for Montana.

7. The annual taxation impact for Alberta is projected at $14.7 million (Cdn.) and for Montana at $3.7 million (U.S.).

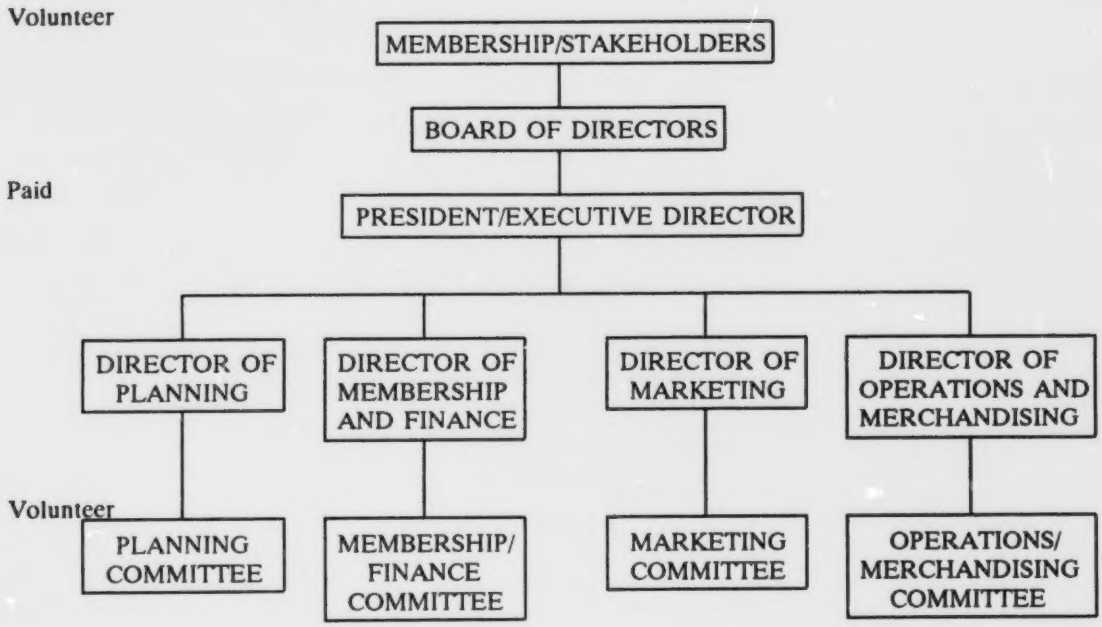
It is evident from the analysis that the Trail of the Great Bear will have a positive impact on Alberta and Montana. The future development of the Trail will result in an increased number of visitors, shifting of visitor use, growth in service sector facilities and opportunities, and substantial tourism expenditures.

8.0 Implementation Strategy

The implementation of the Trail of the Great Bear will require the coordinated efforts of a number of groups and individuals from the public and private sectors. Research of other scenic corridors has shown that a central organization is required to provide a solid foundation for coordinated growth and development and act as a centralized source for drafting and implementing action plans, as well as acting as a central organization to interface with the tourism and travel industry, and national and international marketing networks. A suggested organization chart for the administrative structure is presented in Table 8-1. The existing Trail of the Great Bear Society could evolve into this organization.

TABLE 8-1

TRAIL OF THE GREAT BEAR MASTER ORGANIZATION ORGANIZATION CHART


Volunteer
MEMBERSHIP/STAKEHOLDERS
BOARD OF DIRECTORS
Paid
PRESIDENT/EXECUTIVE DIRECTOR
DIRECTOR OF PLANNING
DIRECTOR OF MEMBERSHIP AND FINANCE
DIRECTOR OF MARKETING
DIRECTOR OF OPERATIONS AND MERCHANDISING
Volunteer
PLANNING COMMITTEE
MEMBERSHIP/ FINANCE COMMITTEE
MARKETING COMMITTEE
OPERATIONS/ MERCHANDISING COMMITTEE

Comparative research showed that volunteerism and community stakeholder involvement is a critical element in the success of a tour corridor. Volunteers are critical to ensure support and continuity by allowing participation from stakeholders throughout the entire length of the Trail. For example, loop tours will be identified and developed by the various communities along the route. More specifically the role of the volunteer committees would be to provide support to each director in terms of staffing, input and geographic representation. In turn, local committees could be established to follow through on the plans determined by the central committee.

One of the overriding objectives for the implementation strategy is the goal of financial self sufficiency for the Trail of the Great Bear organization. This could feasibly be attained through the implementation of its membership program, corporate sponsorship, sale of advertising revenues, the sale of Trail of the Great Bear logo and commercial items. A suggested action plan outlining the general implementation and development process of the proposed Trail of the Great Bear is presented in Table 8-2. It must be noted that while some tasks do have a definite time line, others would be ongoing throughout the life of the Trail of the Great Bear scenic corridor. Also due to the different jurisdictions, some aspects may see completion sooner than others.

TABLE 8-2
TRAIL OF THE GREAT BEAR
OVERALL IMPLEMENTATION/DEVELOPMENT ACTION STEPS

ACTION STEPS	PERFORMED BY	TIMING (YEARS)
Form master organization, protect Trail of the Great Bear name	Trail of the Great Bear Society	0 - 1
Appoint Board of Directors	Trail of the Great Bear Society	0 - 1
Appoint President/Executive Director	Board of Directors	0 - 1
Ratify philosophy, goals, objectives	Board of Directors and President/Executive Director	0 - 1
Initiate liaison with respective government bodies	Board of Directors	0 - 1
Identify and confirm sources of funding	Board of Directors	0 - 1 and On going
Organize and implement fundraising drive	President/Executive Director	0 - 1 and On going
Appoint Directors	Board of Directors	0 - 1
Establish developmental guidelines for the Trail, develop policies and set technical standards for Trail participants	Officers	0 - 1
Address concerns such as policies/bylaws identified that may impede the implementation of the Trail and identify policies/bylaws which enhance or support the Trail and work with the various agencies involved in their administration	Director of Planning	0 - 1
Establish membership guidelines, levels	Officers	0 - 1
Establish and implement membership sales program	Director of Membership and Finance	0 - 1
Implement membership drive and pursue members	Director of Finance and Membership and Membership/Finance Committee	0 - 1 and On going

Table 8-2 Continued

ACTION STEPS	PERFORMED BY	TIMING (YEARS)
Develop information package for distribution	Director of Marketing	1 - 3
Determine Trail management sections within the corridor	Officers	1 - 3
Establish committees to support the organization	Officers	1 - 3
Appoint representatives from management sections to committees	Director of Planning	1 - 3
Establish and implement a signing program (trailblazer, interpretive, and attractions)	Director of Operations and Merchandising and Operations/Merchandising Committee	1 - 3
Establish committees to identify loop tours	Director of Planning	1 - 3+
Design a corridor development plan addressing infrastructure needs, road improvements, site interpretation/restoration/development and environmental considerations	Director of Planning and Planning Committee	1 - 3
Initiate creation of commercial Trail publications, souvenirs, specialty items	Director of Operations and Merchandising and Operations/Merchandising Committee, Director of Membership and Finance and Membership/Finance Committee	1 - 3+
Implement corridor development plan	Director of Planning and Planning Committee and Director of Operations and Merchandising and Operations/ Merchandising Committee	3 - 5+
Design and implement tourism monitoring system	Director of Operations and Merchandising and Operation/Merchandising Committee	3 - 5 On-going

9.0 Marketing Strategy

A comprehensive marketing strategy isolates market segments most likely to use the Trail of the Great Bear, and positions its marketing efforts to fulfil the needs of the selected markets. This concept has been positioned as an international scenic touring corridor that uses the grizzly bear as a logo symbol of the region's unique wilderness heritage. Key features of the Trail that should be emphasized are as follows:

- The international component of the Trail;
- The variety of accessible flora and fauna along the Trail; and
- The variety and preserved status of unique natural, cultural and historic resources enroute.

As a new product, further market testing of the name and concept will be required. Demand will need to be stimulated for the Trail by targeting specific markets with key marketing themes that convey the impression of what the visitor can expect to find along the route. Table 9-1 outlines the major marketing themes, target markets and product examples with a seasonal component for the Trail.

TABLE 9-1
MARKETING THEMES/PRODUCTS
TRAIL OF THE GREAT BEAR

	Marketing Themes	Target Markets	Product Examples	Seasonality
1.	National Parks	• National Parks visitors • Special interest groups • Overseas markets (Japan, Germany, U.K.) • Fly and Drive	• Mountains, scenery, wildlife, forests, nature • Banff/Waterton-Glacier/Yellowstone National Parks	Year-around
2.	Native Culture	• Attractions/Special Events • Group touring • Overseas markets • VFR/short getaway • Fly and Drive	• Chief Mountain, Head-Smashed-In Buffalo Jump, Blackfeet and Peigan Reserves, Plains Indian Museum	Year-around
3.	Non-native Culture	• Attractions/Special Events • Group touring • Overseas markets (United Kingdom, Japan) • VFR/short getaway • Fly and Drive	• Montana State Historical Society, Lewis and Clark Centre, Museum of the Rockies, C.M. Russell Museum, Frank Slide Interpretive Centre	Seasonal (May 1 - September 1) some year-around
4.	Historic Sites	• Attractions/special events • VFR/short getaway • Group touring • Fly and Drive	• Bozeman Trail, Anaconda, • Grant-Kohrs National Historic Site, Fort Whoop-Up, Fort Macleod, Crowsnest Pass, and several interpretive centres	Seasonal (May 1 - September 1), some year-around

Table 9-1 Continued

Marketing Themes	Target Markets	Product Examples	Seasonality
5.* Soft Adventure Tourism/Recreation	• Fly and Drive • Special interest groups • Pacific Northwest • British Columbia, Alberta, Montana	• Skiing, snowmobiling, canoeing, white-water rafting, horseback riding	Seasonal (i.e. winter - skiing; spring/summer - canoeing)
6. Wildlife	• Ecotourism groups • National parks visitors • Overseas markets (Germany) • Fly and Drive	• Trout streams, large mammals • Habitats • Birds	Seasonal (Spring/Fall especially good viewing times)
7. Nature Appreciation	• National parks visitors • Overseas markets (Germany) • Ecotourism groups • Fly and Drive	• Flora, Fauna, rock formations (i.e. Columbia Rockies) foothills, land forms	Seasonal (Spring/Fall)

* Soft adventure refers to experiencing outdoor activities such as skiing, canoeing, hiking and horseback riding with the comforts of modern day amenities (i.e. luxury in the midst of the wilderness).

Four key marketing strategies were identified which should drive the marketing of the corridor region, with their respective marketing objectives and target markets.

Marketing Strategy #1

To position the Trail as an "ecotourism model" for a scenic corridor, that responds to sensitive environmental issues and sustainable tourism industry development concerns.

Marketing Objectives

- To increase awareness of the Trail's historical, cultural and natural resources.
- To identify and encourage protection of resources which are environmentally fragile and which contribute strongly to the Trail's landscape.

Target Markets

- National Parks visitors.
- Special interest groups (i.e., ecotourists).
- Private automobiles/fly and drive markets from national/overseas origins.

Marketing Strategy #2

To market the Trail as an international corridor that connects four world-class national parks, and acts as a gateway to wilderness tourism.

Marketing Objectives

- Establish tourism themes based on existing features.
- Increase recreational opportunities for visitors.
- Establish well defined interpretive materials and signage to inform visitors of the Trail.
- Increase international tourism to the corridor area.

Target Markets

- Overseas visitors (i.e., fly-drive, R.V. rental markets to Alberta/Montana with emphasis on Germany and the United Kingdom).

- Private automobiles/R.V. travellers to Alberta/Montana from other provinces/states.

- National park visitors to Banff, Waterton, Glacier, and Yellowstone.

- Special interest groups with focus on wilderness/ecotourism.

Marketing Strategy #3

To establish a marketing image for the Trail that emphasizes visitor enjoyment of the various resources, and supports educational opportunities along the route.

Marketing Objectives

- Increase recreational/educational opportunities for visitors.
- Establish well defined interpretive materials/centres to inform and educate visitors.
- Increase awareness of the Trail as a vacation destination opportunity.

Target Markets

- Mountain and Pacific Coast States, British Columbia and Saskatchewan residents - especially families with children.

- Overseas markets, focusing on Germany, Japan, and the United Kingdom.

- Group touring and V.F.R. markets.

- Private vehicle touring market.

Marketing Strategy #4

To market the Alberta/Montana regions that encompass the Trail as four season destination areas.

Marketing Objectives

- To increase spending by current and potential visitors to the corridor area.
- To increase tourism flow to the corridor area in the shoulder seasons (spring, fall, winter).
- To increase the length of stay of visitors to the region.
- To expand existing visitation along the corridor.
- To redistribute visitation from highly travelled tourism areas in the summer to less crowded loop tour destinations.

Target Markets

- Seniors market from urban geographic areas, especially recreational vehicle owners.
- Short getaway market for extended weekend vacations.
- Overseas markets, focusing on the fly and drive and tour group travellers from Germany, Japan and the United Kingdom.
- North American markets - fly and drive and tour group travellers.

10.0 Conclusion

The Trail of the Great Bear provides an opportunity for Alberta and Montana to become leaders in a unique tourism initiative that uses, but conserves the natural, historical and cultural resources that form its product base.

The implementation of this concept should be considered as a long term project. As stated earlier, some scenic tour highway concepts have taken up to 50 years to reach maturity. In addition, since the majority of visitors will not have time to visit the entire route in one trip, various segments or loop tours may be used instead. Some of these may develop faster than others, depending on their promotion, their accessibility, and the degree of support that is provided by local communities along the route. With good airports and gateways at key locations along its route, good existing paved roads throughout its length, visitor services which are strategically located, and the outstanding resources and attractions the route offers, there appears to be every opportunity to develop a tourism product which is economically viable, sustainable, and unique in the world.

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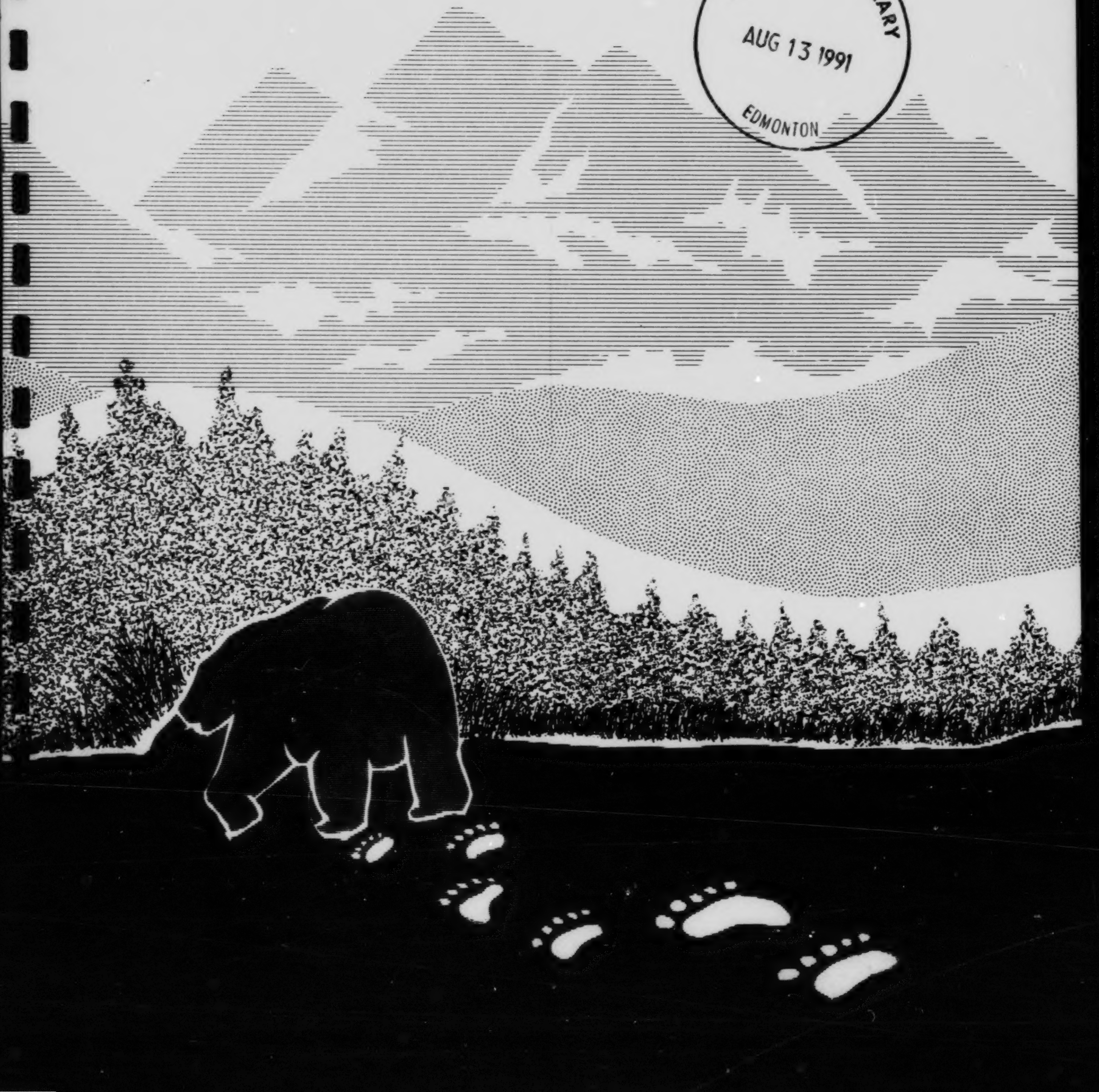

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The following consultant's report was undertaken to examine the Trail of the Great Bear Concept which proposes to establish an international scenic touring corridor that links the world's first national park, Yellowstone, to the world's first international peace park, Waterton-Glacier, to Canada's first national park, Banff.

The report provides refined details on the Concept including a proposed corridor routing; recommends an implementation and marketing strategy; and an inventory and assessment of the Trail's major tourism resources, and potential markets. The study is intended primarily to provide information to individuals and organizations (non-profit, private, public sector) who may be interested in implementation of the Concept. It is anticipated that implementation will be co-ordinated and lead by the Trail of the Great Bear Tourist Society.

It should be noted that the study was conducted by an independent consultant, and was funded through the Canada/Alberta Tourism Agreement and the State of Montana. As such, this study does not represent the policies of the respective governments, nor does it imply any commitment to implementation.

If you have any comments relative to the report, please forward them to either:

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Planning Division
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59620
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Comments concerning implementation activities should be forwarded to the Trail of the Great Bear Society, c/o Ms. Beth Russell, Box 142, Waterton, Alberta - TOK 2MO, telephone - (403) 859-2663.

Additional copies of this report are available by contacting the Society.

Sincerely,

Bernard F. Campbell
Deputy Minister
Alberta Tourism

Sandra Guedes
Director of Tourism
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TRAIL OF THE GREAT BEAR

STUDY

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November, 1990

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SECTION ONE: INTRODUCTION

1.1 STUDY BACKGROUND

The Trail of the Great Bear is a proposed concept that seeks to plan and develop a viable tourism industry through environmentally and culturally sensitive, thematic development. It involves the establishment of a new scenic tourism corridor that would span both Alberta and Montana, from the gates of Yellowstone National Park, through Waterton-Glacier International Peace Park, (Waterton Lakes National Park and Glacier National Park form Waterton/Glacier International Peace Park), to the gates of Banff National Park.

1.2 STUDY PURPOSE

The purpose of the study was, within a defined study area, to inventory and assess the physical and resource capability for the Trail of the Great Bear concept and determine potential markets for the concept as a tourism product. In addition, the study was to refine and develop details on the concept as well as develop implementation and marketing strategies. The results of the study are to provide direction in establishing and marketing the Trail of the Great Bear concept as a clearly defined, marketable international tourism product that would:

- be able to increase tourism in the region
- be able to realize a mutually beneficial relationship between resource integrity and tourism use, and
- be marketable to specific target demographic and psychographic consumer groups from the domestic and international markets who have been identified from the study.

1.3 STUDY AREA

The study area was bounded in the north by the Trans Canada Highway from Banff National Park to Calgary, and to the south to Yellowstone National Park. The eastern limits included and followed Highway 2 in Alberta, south from Calgary, then east to include Lethbridge, following the U.S. Highway 89 through Great Falls and Helena, Montana, then south to

Yellowstone. The western boundary was the British Columbia border in Canada and the western shore of the Flathead Lake area to Missoula, Montana. The study area is shown on Map 1.

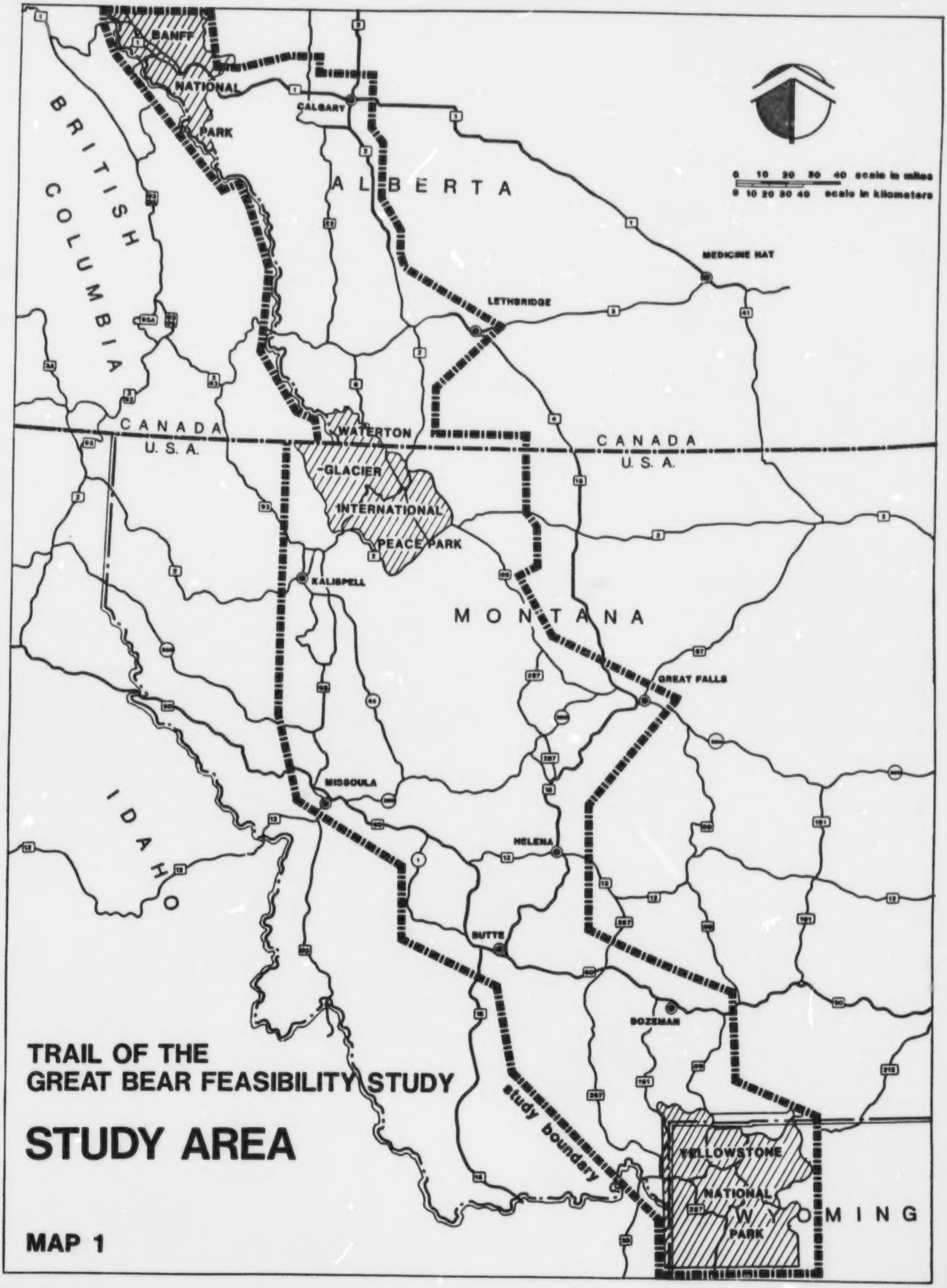
1.4 STUDY PROCESS

During the course of the study, stakeholders were advised of the study, and invited to provide input. These included community groups within the study region, industry members and representatives, special interest groups and technical advisors in government departments in both Canada and the United States.

The study was carried out in several phases. The first phase included the visitation of all routes in the study area and the identification of the natural, historical, cultural and tourism resources on each route. These routes were divided into segments, mapped and resources were documented. Criteria were developed and applied to the route segments to determine which segments might comprise the Trail of the Great Bear. A preliminary set of routes were identified and mapped as the first suggested routing for the Trail of the Great Bear. The maps and criteria were then forwarded to stakeholders and technical advisors to obtain their input, and from these processes, the Trail of the Great Bear emerged as described in this report.

Other research included the review of other touring route corridors to determine their structures, their operating experience and history, their marketing activities and other information which could assist in the implementation and organization of the Trail of the Great Bear. Bylaws and regulations that could enhance or constrain the development of the concept, in both Canada and the United States were also researched.

Determining market demand for the concept required research of markets at regional, national and international levels, and the information provided input not only on what the size and scope of demand might be, but on the products and services that are required to attract visitors.


BANFF
NATIONAL
PARK
CALGARY
BRITISH COLUMBIA
ALBERTA
0 10 20 30 40 scale in miles
0 10 20 30 40 scale in kilometers
MEDICINE HAT
LETHBRIDGE
CANADA
U.S.A.
CANADA
U.S.A.
WATERTON
-GLACIER
INTERNATIONAL
PEACE PARK
KALISPELL
MONTANA
GREAT FALLS
MISSOULA
HELENA
IDAHO
BUTTE
BOZEMAN
study boundary
YELLOWSTONE
NATIONAL
PARK
WYOMING

TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

STUDY AREA

MAP 1

On the basis of the above, the Trail of the Great Bear was defined, together with its resources, themes and potential tourism products. Finally, marketing and implementation strategies were developed and the social and economic impacts of the Trail of the Great Bear concept were defined in broad terms.

1.5 QUALIFIERS

The defined study area for the Trail of the Great Bear covered an immense land mass with the final routing traversing some 2,085 miles (3,350 kilometres).

Within the area there exist numerous resources as well as areas of concern and constraints in terms of resource capacity, environmental issues and development limitations. Due to the large scope of the project, a detailed inventory or analysis for all specific areas or sites, resources, opportunities or constraints, could not be performed within the parameters of this study.

The Trail of the Great Bear is a long term project. Some scenic byways have taken up to 50 years to reach their potential. Consequently, it is conceivable that some areas may develop faster than others, so that the state of increased visitation may vary greatly along different sections of the route. The pace of development will depend on many future events and factors, including; community involvement, marketing and promotion programs, and the level of acceptance and interest of the markets to the product. Because of these factors, which are external to this report, measurement of demand, assessment of some impacts, and forecasting of economic opportunities and impacts should be considered to be estimates or guidelines, rather than specific predictions.

While support in principle for the Trail of the Great Bear concept has been expressed by various government agencies, corporate stakeholders and private stakeholders; commitment by any individual or agency regarding financial support for the project and its implementation has yet to be determined.

1.6 REPORT ORGANIZATION

The report for Trail of the Great Bear has been divided into three sections. Section One presents a brief synopsis of the purpose of the study, the boundaries for the study area, and the study process that was followed to conduct the research, and to ultimately provide direction for the implementation and marketing strategies.

Section Two represents the core of the report, and in essence the most relevant information. This section initially describes the Trail of the Great Bear concept in terms of the philosophy, goals and objectives, major resources, potential themes, the corridor area (i.e. routing, loop tours, gateways) and potential opportunities created by the Trail. It follows with a presentation of both existing and potential market demand (i.e. key target markets, visitation numbers for the Trail) for the proposed corridor area. The economic and social impacts, implementation and marketing strategies are then described with specific detail to commence the action steps for the Trail.

Section Three provides support information for the core material presented in Section Two (i.e. resource inventory, policies and bylaws and market research).

SECTION TWO: TRAIL OF THE GREAT BEAR

2.1 CONCEPT

2.1.1 Scenic Highway Developments: An Introduction

In the course of the study, research was conducted on several scenic corridors in other jurisdictions. To better assist in understanding the development process of scenic byways, and to some extent the processes that will be required for the development of the Trail of the Great Bear, a summary of the characteristics and history of some of these scenic highways has been included here.

The characteristics that were found relative to scenic highways and tourism corridors include, in summary form, the following:

1. Most scenic highways have been formed by joint ventures between non-profit organizations, private sector and industry volunteers, and government.

2. For marketing and administrative purposes they are frequently organized and promoted in segments or loop tour configurations. This permits local and regional organizations to administer one or more sections of the scenic byway, and responds to the need of those visitors who can only tour one or two sections of the scenic highway at one time.

3. Most scenic highways that have been developed to date, are within a one day driving distance from major population centres of one million or more.

4. Scenic highways incorporate natural, historical, and cultural resources along the route and conserve them as valuable tourist attractions. Tourism developments are subject to some degree of control such as design and locational guidelines, to protect the integrity of the themes and resources.

5. New scenic highways must generate considerable increases in visitor traffic on their own merit, before attracting new commercial tourism and recreational developments.

6. The development process is a complex and lengthy one, requiring in some cases as many as fifty years before some scenic highways reach maturity as tourism products.

The development of the Trail of the Great Bear, which will not be located in proximity to major population centres, can also be expected to develop over a long period. It covers a vast territory and comes under the jurisdiction of numerous authorities including federal, provincial and state, regional and municipal governments, and industry and volunteer organizations. Its implementation will, to some extent, be similar to other scenic byways. Assistance for the Trail of the Great Bear could be available in the United States where Congress is now studying a report on scenic highways, and is considering the potential of developing specific programs to help in their development.

2.1.2 Trail of the Great Bear: Philosophy and Concept

The philosophy of the Trail of the Great Bear is to commemorate and perpetuate cultural, wildland and national park values and to further an appreciation and an understanding of these values through promotion of appropriate recreation and tourism uses associated with them. The concept of the Trail of the Great Bear is to link Yellowstone, the world's first national park through the world's first international peace park, Waterton/Glacier, to Canada's first national park, Banff. The concept encourages recreation and tourism uses, and developments and services that are compatible with, and promote a greater understanding of, existing natural, historical and cultural resources and values, while recognizing that a healthy and economically viable tourism industry is essential to support these aims.

2.1.3 Trail of the Great Bear: Goals and Objectives

The goals of the Trail of the Great Bear are to:

- promote and perpetuate cultural, wildland and national park values;

- further an appreciation and understanding of these values;
- encourage the development of an economically viable tourism industry that recognizes, encourages and supports a mutually beneficial relationship between resource integrity and tourism use;
- increase tourism benefits to the region through the implementation of the Trail of the Great Bear concept;
- increase economic impacts to the region through tourism developments and activities that reflect the Trail of the Great Bear philosophy;
- develop the Trail of the Great Bear route as an international corridor with a high quality recreation/vacation experience.

From these goals the following objectives have been derived.

- To develop a tourism corridor offering access, interpretation and education for wildlands, wildlife and historical and cultural attractions within its boundary;
- To design the corridor so that it links Banff National Park, Waterton/Glacier International Peace Park and Yellowstone National Park;
- To provide the opportunity for development of environmentally sensitive, sustainable tourism products, facilities and services congruent with the philosophy of the Trail of the Great Bear;
- To develop a concept that appeals to, and can be practically utilized by, broad market segments.

2.1.4 Trail of the Great Bear: Major Resources

The Trail of the Great Bear links four major national parks, all of which have been highly publicized. Banff National Park is supported through the intensive multi-million dollar marketing from the private and public sector, Waterton/Glacier International Peace Park, for example, received international attention in the National Geographic Magazine in recent years, and Yellowstone National Park, with its famous geyser, Old Faithful, has been the recipient of continued international attention for many years.

Banff and Yellowstone are designated UNESCO World Heritage Sites. The UNESCO (United Nations Educational, Scientific and Cultural Organization) designation signifies that the resource is considered to be of global significance and encourages the conscientious management of those resources. In addition, both Waterton Lakes National Park and Glacier National Park are Biosphere Reserves and both form an International Peace Park.

While these parks have many attractions and resources themselves, the Trail of the Great Bear travels between them, and by itself has many attractions equal to those found in the parks. Overall, the Trail of the Great Bear travels 2,085 miles or 3,350 kilometres and contains an exceptional variety of natural, historical and cultural resources. The resources outside the national parks, however, have only recently begun to be identified and considered for promotion in national and international markets.

Many of these resources have the potential to draw visitors from the national parks or divert them from parks which are currently overcrowded at various periods of the year. On the other hand, the study identified some areas on the Trail where resources are already sensitive to overcrowding. Levels of use in these areas will require careful monitoring, and the promotion of their use during the quieter shoulder seasons of the year should be considered.

From its northern terminal at the Banff National Park east gate, to its southern anchor at the Yellowstone National Park gates, the Trail of the Great Bear encompasses a variety of natural and cultural resources.

From Banff, the route passes through the Rocky Mountains, into the river systems of the Bow Valley Corridor and through the wildland recreational areas of Kananaskis Country. Ranchlands are highlighted in the historical and cultural resources along the route as it continues south to Pincher Creek. There outstanding cultural attractions including the Head-Smashed-In Buffalo Jump Interpretive Centre World Heritage site, the Historic Crowsnest Pass mining region and Fort Macleod RCMP museum, are accessible by connecting routes. As the Trail approaches Waterton Lakes National Park, it enters the Crown of the Continent Ecosystem. Crossing the international border into Montana, the Trail expands to an east and west loop. Following the western loop through Glacier National Park, the Trail traverses the continental divide providing outstanding western-slope mountain scenics and access to a wide variety of wildlife viewing areas. The Flathead Valley and Missoula areas provide major tourism developments and recreational opportunities. From the city of Missoula, the Trail moves east and south through old growth forests offering access to blue ribbon trout streams.

A wealth of historic and cultural attractions are available as the Trail continues south through historic mining areas and high plains terrain. Outstanding wilderness areas and wildlife viewing opportunities are accessible as the route reaches Yellowstone National Park.

The eastern loop of the Trail of the Great Bear contains considerable native and historical resources as it passes through the Blackfoot Indian reserve at Browning and out across great plains grasslands to the city of Great Falls. The C.M. Russell museum and other attractions highlight early western exploration and settlement, a theme further enhanced as the Trail passes through historic Helena, the Montana State capital. Eastern slopes terrain and mountain geology highlight the landscape and many wetland and other preserved habitats provide access to wildlife viewing. The eastern loop meets the western loop at Whitehall and continues on to Yellowstone National Park.

The Trail of the Great Bear is well supported by nodes of tourism developments, including destination resorts in the Banff and Kananaskis areas in Alberta, Flathead tourism area in Montana and resort developments at the southern end of Montana near Anaconda and Big Sky.

Existing infrastructure and related transportation services to the Trail of the Great Bear are good, with eight cities and towns on the Trail offering regular year round commercial airline flights, and two having direct access onto the Trail from Amtrak, the United States railway passenger system.

Many sections of the Trail lend themselves to four season travel and provide attractions and winter sports activities. In some cases these are not directly related to ecotourism or the philosophy of the Trail of the Great Bear, but can form important sources of visitors for the Trail of the Great Bear concept. Winter ski touring is supported by the ski resorts both inside and outside of the parks in Alberta, in and around the Whitefish ski area of Big Mountain, at developed ski areas in the Missoula area as well as in the regions of Helena, Big Sky and West Yellowstone. Most of the natural resources also provide exceptional wildlife viewing opportunities especially during the spring and fall.

The resources on the Trail of the Great Bear include excellent and unique natural and tourism resources and strong historical and cultural attractions which may not yet have been developed to their potential. The road systems which have been identified and selected as the Trail of the Great Bear are in satisfactory condition and there are tourism services located throughout the Trail at frequent intervals. In addition, there are a variety of recreational areas at key locations along the Trail. The potential exists for upgrading and/or expansion of some of these, and the development of new ones. Finally, the Trail of the Great Bear enjoys good access from major centres strategically located on the Trail which have regular airline or rail service from major markets.

A large number of significant Native sites also exist, such as, Head-Smashed-In Buffalo Jump Interpretive Centre.

2.1.5 Trail of the Great Bear: Potential Themes

Major themes exist which make the area of the Trail of the Great Bear unique in the world. These themes, which are not meant to be mutually exclusive, include wildlands and wildlife themes, native, historical and cultural themes, the history of the settlement of the west in North America, major ecosystems, and a vast variety of unusual land forms, which of themselves provide the opportunity for geological and archaeological themes. In addition, there is an opportunity to combine within a theme, the large number of recreational opportunities offered along the entire length of the Trail of the Great Bear.

2.1.5.1 Wildland and Wildlife Themes

Within the Trail of the Great Bear corridor is an abundance of wildlands, preserving mountains, forests, prairie, wetlands and unique landforms. These provide major opportunities for the development of themes. They also provide extensive habitat for an impressive variety of wildlife species including the southern-most range of the grizzly bear. Wildlife viewing offers significant thematic opportunities as large numbers of elk, deer, buffalo, antelope, mountain sheep and many other viewable species are accessible along the route.

Much of the Trail of the Great Bear is on the flyway of migratory waterfowl. The network of rivers and marshes within the Trail of the Great Bear, together with other habitat types provide excellent bird watching opportunities. In this regard, it is also one of the few areas in North America with such a wide variety of eagles and hawks still existing in their natural habitat. The rivers and streams also support some of the most outstanding trout fishing streams in the world, from the Bow River at the northern extreme of the Trail of the Great Bear to the Yellowstone River at its most southern point.

In many parts of the world, where untouched wildlands exist in the condition of those found along the Trail, they are difficult to access, and where they are easily accessible, they have not been preserved. In this regard, the Trail of the Great Bear is unique, offering both untouched wildland and accessibility to protected areas.

The thematic structure of Trail of the Great Bear can be divided into key theme areas with sample sub-themes within as illustrated in Table II-1.

TABLE II-1

THEMATIC STRUCTURE TRAIL OF THE GREAT BEAR

Wildlands and Wildlife

- Natural Regions
- Wildlife
- Exceptional Habitats
- Land forms
- National/Provincial/State Parks

Cultural and Historical

- Native Culture
- Native Trails
- Native Spirituality
- Settlement Towns
- National Park Values
- Land Use History
- Native History
- Buffalo Jumps
- Mining
- Exploration/Fur Trade
- Whiskey Trade
- Military
- Ranching
- Oil and Gas
- Interpretive Centres/Museums

Source: Pannell Kerr Forster research

2.1.5.2 Historical/Cultural Themes

Historical themes exist which revolve around both native history and non-native settlement. Native history includes the history of the lifestyle of the various native groups throughout the area, ranging from those who were dependent upon the buffalo, to chert mines and other lifestyle types. These are located throughout the area and are represented in museums and interpretive sites including world-class facilities like the Head-Smashed-In Buffalo Jump Interpretive Centre, World Heritage Site.

The history of non-native settlement includes the early explorers and fur trade, farming and mining and the area of whiskey trade and law enforcement. Ghost towns, some of them refurbished, numerous forts, and mining sites both active and abandoned together with numerous museums in both Alberta and Montana are major resources which support these historical themes.

The sites of early native culture and spirituality are numerous in the area, and of themselves represent a unique theme. The settlement towns and forts which were built to support non-native activity such as the fur trade, mining and ranching are resources which would support cultural themes unique to the west, such as the attempt at civilization through the introduction of "opera houses" to the "wild west" sponsored by mining town and commercial developments. Foothills, ranching and ranch life is unique to the entire area as well as the culture and history of the four national parks.

2.1.6 Trail of the Great Bear: Corridor

The Trail of the Great Bear is composed of a system of roads linking the four national parks. It includes some side routes to attractions of particular interest, and seasonal alternative routes. The selected roads are in satisfactory condition and with the completion of current paving programs in Alberta, the entire Trail will be located on paved highway. In addition, the Trail of the Great Bear is well provided with service centres, so that travellers are never more than a one hour drive from services. Gateways to the Trail of the Great Bear from major sources of markets are strategically located throughout its length. The Trail of the Great Bear is shown on Map 2.

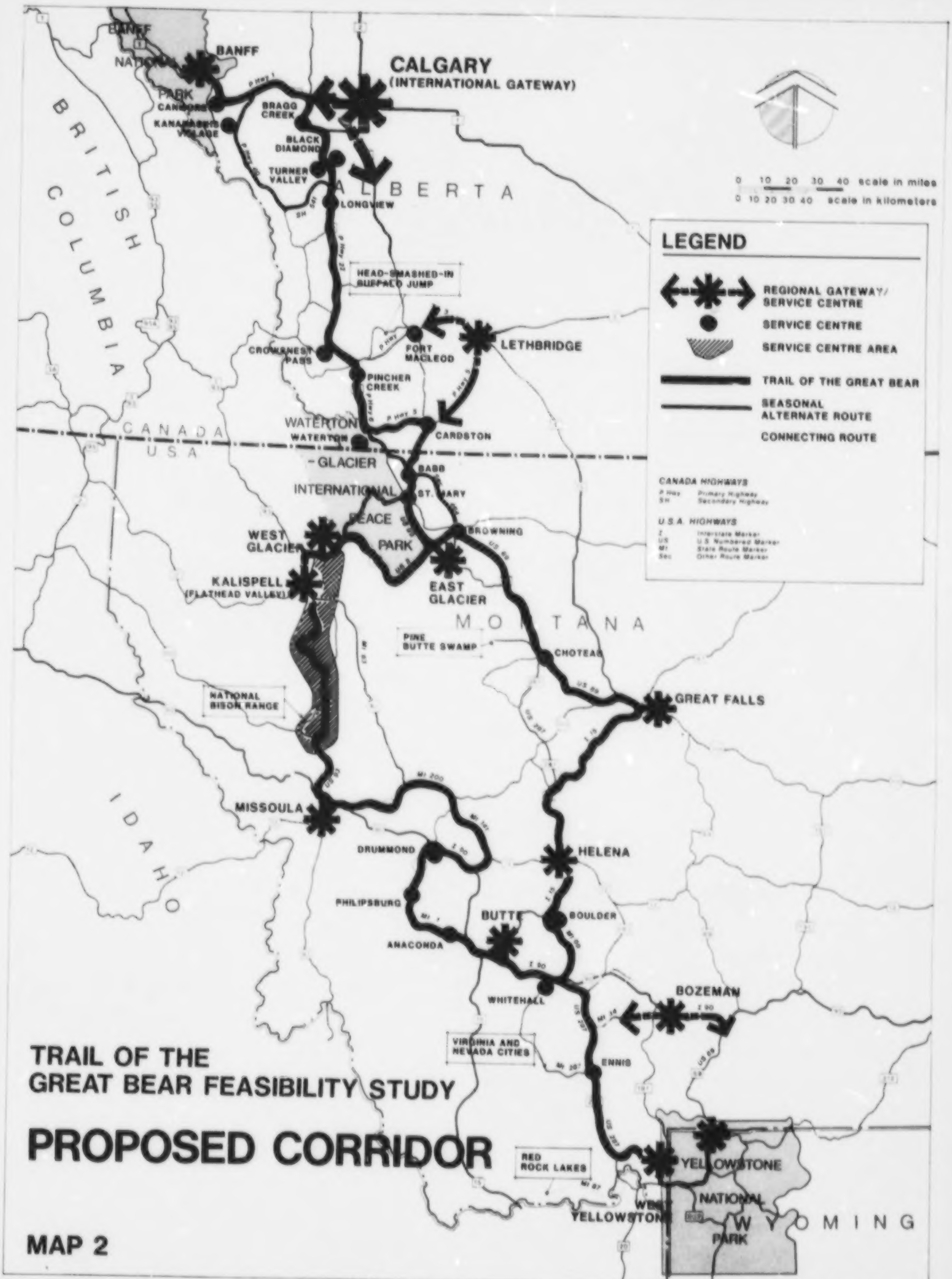
2.1.7 Trail of the Great Bear - The Route

The northern gateway of the Trail of the Great Bear is located at the gates of Banff National Park. From here the Trail travels east on the Trans Canada Highway through the Bow Valley Corridor to Highway 22 west of the city of Calgary. The Trail then travels south on Highway 22 connecting with Crowsnest Pass and on to Pincher Creek on Highway 3. From Pincher Creek the Trail travels south on Highway 6 to Waterton National Park, looping east to Cardston on Highway 5 then south on Highway 2 across the Montana border at Carway to Babb, Montana.

In Montana the Trail follows U.S. Highway 89 from Babb to St. Mary to Browning. At Browning, the Trail of the Great Bear forms a loop east and west. The western loop travels along U.S. Highway 2 to West Glacier and the Whitefish, Kalispell and Flathead Lake Recreational Area. It then follows U.S. Highway 93 on the west side of Flathead Lake south to Missoula. From Missoula the Trail follows Montana Highway 200 east following the Blackfoot River between the Lolo National Forest and the Garnet Range to the junction of Montana Highway 141 where it turns south and continues on Montana Highway 141 back to Interstate 90 and west to Drummond. At Drummond the Trail goes south on Montana Highway 1 through the Deer Lodge National Forest to Anaconda then continues east on Interstate 90 to Butte and Whitehall.

The eastern loop from Browning, travels south on U.S. Highway 89 through Choteau to Great Falls then south on Interstate 15 through Helena to Boulder where it continues south on Montana Highway 69 joining the western loop at Whitehall. From Whitehall the Trail travels east on Interstate Highway 90 to Three Forks before turning south on U.S. Highway 287 to its termination at the west gate of Yellowstone National Park, in the town of West Yellowstone.

There are numerous connecting routes which permit the Trail of the Great Bear to be connected to major gateways and/or outstanding attractions. In Alberta these connecting routes include Highway 3 which connects Pincher Creek with Fort Macleod and Head-Smashed-In Buffalo Jump as well as the gateway of Lethbridge.


BANFF
NATIONAL
PARK
BANFF
CALGARY
(INTERNATIONAL GATEWAY)
CANMORE
KANANASKIS VILLAGE
BRAGG CREEK
BLACK DIAMOND
TURNER VALLEY
LONGVIEW
ALBERTA
BRITISH COLUMBIA
P Hwy 1
P Hwy 22
SH 541
HEAD-SMASHED-IN BUFFALO JUMP
CROWSNEST PASS
FORT MACLEOD
LETHBRIDGE
PINCHER CREEK
P Hwy 3
P Hwy 5
P Hwy 6
WATERTON
CARDSTON
CANADA
USA
WATERTON-GLACIER INTERNATIONAL PEACE PARK
BABB
ST. MARY
BROWNING
WEST GLACIER
EAST GLACIER
KALISPELL
(FLATHEAD VALLEY)
US 2
US 89
MONTANA
PINE BUTTE SWAMP
CHOTEAU
GREAT FALLS
NATIONAL BISON RANGE
I 15
MI 200
MI 141
US 93
MISSOULA
IDAHO
DRUMMOND
I 90
HELENA
PHILIPSBURG
MI 1
BUTTE
BOULDER
ANACONDA
WHITEHALL
BOZEMAN
MI 84
US 287
VIRGINIA AND NEVADA CITIES
ENNIS
MI 287
US 89
RED ROCK LAKES
MI 87
WEST YELLOWSTONE
YELLOWSTONE NATIONAL PARK
WYOMING
0 10 20 30 40 scale in miles
0 10 20 30 40 scale in kilometers
LEGEND
REGIONAL GATEWAY/ SERVICE CENTRE
SERVICE CENTRE
SERVICE CENTRE AREA
TRAIL OF THE GREAT BEAR
SEASONAL ALTERNATE ROUTE
CONNECTING ROUTE
CANADA HIGHWAYS
P Hwy Primary Highway
SH Secondary Highway
U.S.A. HIGHWAYS
I Interstate Marker
US U.S. Numbered Marker
MI State Route Marker
Sec Other Route Marker

TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

PROPOSED CORRIDOR

MAP 2

In Montana on the western loop, a connecting route south of the Flathead Lake on Secondary Route 212 would permit visitors to view the National Bison Range on the Flathead Indian Reservation while a second connecting route travels through the Swan River Valley along Montana Highway 83 from the junction of Montana Highway 35 north of Big Fork to the junction with Montana Highway 200 in the south. On the eastern loop, connecting routes include U.S. Highway 287 from Choteau through Augusta to Wolf Creek and the Heart Butte Loop south of Browning, rejoining U.S. Highway 89 north of the Montana Highway 44 junction at Birch Creek.

At the southern end of the Trail, connecting routes include Highway 20 west from West Yellowstone to the Red Rock Lakes and U.S. Highway 287 west at Ennis to the refurbished mining towns of Virginia and Nevada Cities. Another connecting route in this segment goes east from U.S. Highway 287 on Montana Highway 84 to Bozeman and east from Bozeman on Interstate 90 to Livingston. From this point the connecting route travels south on U.S. Highway 89 to the north gates of Yellowstone National Park at Mammoth Hot Springs.

Alternate seasonal routes have also been selected, some to enhance the Trail of the Great Bear during the summer season, and others to compensate for roads which are closed in winter. In Alberta the major alternate seasonal route is Highway 40, south from the Trans Canada Highway, which is accessible during summer and fall. It travels through the highly scenic Kananaskis Country, and along Secondary Highway 541 to Highway 22 south of the Trans Canada Highway at Longview. The other similar seasonal alternative route is the Chief Mountain Highway which goes from Waterton to Babb, Montana. In Montana, a summer season alternate route that is recommended as part of the Trail of the Great Bear, is the Going-to-the-Sun Road through Logan Pass to West Glacier. A winter seasonal alternate route travels from Babb to Browning on Secondary Route 464. At the south end of the Trail of the Great Bear, a seasonal alternate route travels through Yellowstone National Park during the summer months on Highways 14 and 21.

2.1.8 Gateways

Gateways are an important part of a tour system. They must provide access between physical routes and a large number of markets, yet in themselves must have sufficient services and attractions which relate to the overall tour theme in order to provide visitors with an introduction to the theme of the tour itself.

A total of 13 gateways have been identified for the Trail of the Great Bear. Gateways are specific points from which travellers may access or leave the Trail. All gateways selected provide either air or rail transportation from other major centres in North America or abroad, or, like Banff and Yellowstone, are major attractions themselves, and will provide a fairly large source of potential travellers for the Trail. The gateways in Alberta are:

Calgary

This city has a major international airport with direct flights from all major cities and other gateways in Canada, and direct flights from the United States, Britain and Holland. The city, with a population of just under 700,000, has a full complement of services including car rentals, air and bus charter services, budget and luxury hotels, shopping centres, theatres, sports complexes, restaurants, hospitals and attractions. It is the current international gateway for visitors to Banff National Park and a major convention city in western Canada, providing opportunities to promote the Trail of the Great Bear to international visitors and to convention delegates as a pre and post convention tour. The Calgary Convention and Visitors Bureau reports that approximately 8.5 million people visited Calgary in 1989. Several attractions in Calgary complement the Trail of the Great Bear, including the Glenbow Museum, which displays many items relating to the old west and its natural resources, Heritage Park, which portrays three themes; a frontier fur trade fort, a turn-of-the century town and a farming community, the annual Calgary Stampede and Exhibition, the Calgary Zoo, and Fort Calgary, the first police settlement in the area.

Banff

Parks statistics indicate that approximately four million people visit Banff National Park annually, with approximately one million visits derived from Alberta day skiers. Studies conducted by the Alberta government indicate that touring and sightseeing are the most important trip activities, and this provides a major potential source of visitors to the Trail. Banff and its neighbouring town of Canmore provide a full range of visitor services including car rental and bus charters, campsites, guest ranches, budget and luxury hotels, restaurants, shops, and museums, as well as world class ski areas, golf courses and an internationally recognized four season resort and convention facility, the Banff Springs Hotel. Banff also offers outstanding large mammal viewing opportunities and exceptional scenic mountain views. The Trans Canada Highway traverses Banff National Park, linking this gateway to Vancouver, British Columbia.

Lethbridge

Lethbridge is situated to the east of the mid-Alberta portion of the Trail of the Great Bear. It is connected by air to Calgary and Vancouver with several flights each day. In addition, it is located on Highway 4, the main highway to the United States, and is one of the major routes for visitors from that country.

Lethbridge provides a full spectrum of tourism services and several attractions. Services include an excellent and well located Tourist Information Centre, a full complement and range of hotels, R.V. campgrounds, car rentals, recreation facilities, restaurants, shopping, theatres, and cultural and historical attractions. As a major stop on the route into Canada, it provides an excellent opportunity to promote the Trail of the Great Bear and form the starting point for a major loop tour to the historical, cultural and natural resources in the Crowsnest Pass area, Cardston, Waterton, Pincher Creek, and Fort Macleod areas of the Trail of the Great Bear.

The gateways in Montana are described as follows:

East Glacier

East Glacier is the eastern Amtrak gateway to Glacier National Park. It offers some tourist services, including motels and restaurants, and car rental agencies. The hotel in this area is inside the park and is considered to be of historical significance. East Glacier could be a gateway for eastbound and westbound tours, or tours into Waterton and other Canadian points.

West Glacier

West Glacier is the west entrance to Glacier National Park and is located at the south end of Logan Pass or Going-to-the-Sun Road. It is an Amtrak stop, providing access to the Trail for visitors arriving to the area by rail from national and international destinations. West Glacier offers some hotels and motels and limited food services, car rental services in the summer season, fishing, white water rafting, hiking and trail riding.

Kalispell (Flathead Valley)

The Kalispell, Whitefish and Big Fork area of Montana is a well developed and modern tourism area referred to as Flathead Valley. It offers hotels and motels, golfing, boating and fishing, a major ski area at nearby Big Mountain, and a full complement of shops, service stations, and health care facilities. Kalispell has a commercial airport which offers scheduled service throughout the year connecting with other points in Montana and to national and international markets. Amtrak also stops in this area, again providing visitors with access to the Trail of the Great Bear. The area is very popular with residents of Alberta on a year round basis, and with visitors from California, Northwest and North Central States during the summer. Kalispell would be a gateway for north, east and southbound visitors to the Trail of the Great Bear.

Missoula

Missoula, located at the south end of the Flathead Valley, provides the full services of a small city. The University of Montana is located here and services include hotels and motels, restaurants and shopping malls. An airport connects Missoula to other cities in the state and, through Denver, Colorado and Salt Lake City, Utah to national and international destinations and markets. Missoula also offers excellent fishing nearby, several historic buildings, golf clubs, and winter ski areas. Missoula would be the gateway to northbound or eastbound visitors of the Trail of the Great Bear.

Butte

Butte, located in the southern section of the Trail of the Great Bear, is also a full service city, with hotels, motels and restaurants, as well as commercial air services to other points in the state and national and international destinations through Denver, Colorado and Salt Lake City, Utah. Renowned as a centre of mining activity, Butte features one of the largest open pit copper mines in the world and offers two commercial mining museums. Butte has three ski areas nearby, golf courses, car rental services, and wilderness outfitting services.

Bozeman

This city features 20 hotels and motels, numerous restaurants, health services and shopping facilities. It is the eastern-most gateway to the Trail of the Great Bear, located on Highway 90. It is the main access to Montana and Yellowstone Park from eastern and southern states, and the main tour bus route from Salt Lake City, Utah and Denver, Colorado. Bozeman has a commercial airport with regular services between major points in the state and the regional hub in Salt Lake City, Utah and Denver, Colorado.

Bozeman contains three museums, the Museum of the Rockies, the Galatin Pioneer Museum and the new American Computer Museum. Recreational facilities include two major ski areas, golfing, and excellent fishing. Montana State University is located in Bozeman. This city has renovated and maintained its historic downtown core, and offers complete shopping services and opportunities.

West Yellowstone

West Yellowstone is the major west access to Yellowstone National Park. It is serviced by a commercial airport during the summer months providing connections to Missoula, Salt Lake City, Utah and Denver, Colorado. Full visitor services are provided including hotels, restaurants and retail facilities. The Museum of Yellowstone is also located here and contains a major grizzly bear exhibit. Recreational activities include snowmobiling and skiing. The west entrance to Yellowstone National Park is closed during the winter season.

Great Falls

The city of Great Falls is located on Interstate 15, the main highway to the Canadian border, and it is the first major service centre south of the border crossing of Coutts/Sweetgrass. Great Falls provides a full complement of tourism services including hotels, restaurants and shops. Its attractions include: the C.M. Russell Western Art Museum Complex, a world class attraction featuring numerous works depicting the bear, the Montana Fish, Wildlife and Parks Visitors Centre which contains grizzly bear displays and has in the past offered award winning films about the bear to visitors, the Ulm Pishkun buffalo jump site and Giant Springs Visitor Centre. In addition, the Lewis and Clark National Historic Trail Interpretive Centre, a major facility scheduled to open in the summer of 1993, is being constructed to further the public's understanding and provide appropriate interpretation of the scope and accomplishments of the Lewis and Clark Expedition, highlighting the travels of Lewis and Clark, High Plains Indians, explorers or other historical features of the area. Great Falls also has a commercial airport which provides scheduled air service on a year round basis connecting with regional destinations and through Salt Lake City, Utah and Denver, Colorado to national and international markets.

Helena

Helena is Montana's state capital. This city offers a full variety of tourism services including hotels, restaurants and shopping opportunities as well as sightseeing tours. The capital building and the original Governor's Mansion are both preserved and presented by the Montana Historical Society. In addition, Helena is the location of the Holter Museum of Art, the headquarters for the Annual Rendezvous of Western Art. Other attractions include the Gulch historic area and the Montana State Historical Museum and Gallery featuring many pieces of western art. The headwaters of the Missouri River are located nearby and offer excellent blue ribbon trout fishing. Helena has a commercial airport with regularly scheduled flights connected to regional destinations as well as national and international destinations through Salt Lake City, Utah and Denver, Colorado.

Yellowstone National Park

Yellowstone enjoys an international reputation and draws visitors from around the world. It is abundant with wildlife including, bears, bison, deer, elk, bald eagles, trumpeter swans and a variety of songbirds. Other attractions include mountains, alpine meadows, spectacular waterfalls, deep canyons and magnificent thermal features, including "Old Faithful". Yellowstone is a significant potential source of visitation. It offers a wide range of roofed accommodation and campgrounds as well as foodservice establishments, however, most are seasonal operations with limited winter openings. Recreational opportunities include horseback riding, hiking, boating and cross-country skiing. Yellowstone also has a rich and significant record of native occupation and use dating back over 10,000 years. Yellowstone is primarily located in Wyoming, with a small sliver of land in Idaho and a large border strip in Montana. It will act as a major entry/exit point for the Trail.

2.1.9 Service Centres

While the Trail of the Great Bear's routing traverses through wilderness and mountain areas, the majority of the route has a full complement of service centres. While some service centres are more developed and complete than others, service centres are generally no more than a one hour drive apart.

At the northern end of the Trail, the town of Canmore and the Bow Valley Corridor provide a full complement of services with accommodation, gas, restaurants, and shops as well as numerous campgrounds and guest ranches. Major tourism projects have been proposed for the Bow Valley Corridor which, if implemented, will provide additional services and activities. The resorts at Kananaskis provide three hotels and Kananaskis Country has numerous campsites. On Highway 22 between the Trans Canada Highway and Pincher Creek, there are numerous small communities which can provide restaurants and gas and most have campgrounds in the vicinity. These include the communities of Bragg Creek, Black Diamond, Turner Valley and Longview. Full services are available off the Trail in the towns of Okotoks, High River, Nanton and Claresholm located on Highway 2, which is parallel to Highway 22. Accommodation and full services are available at Pincher Creek, Fort Macleod, Waterton, Cardston and Crowsnest Pass.

In the northern section of Montana, food, gas and some motel services are available at the service centres of Babb, St. Mary, Browning and Choteau. There are numerous campgrounds and campsites in the vicinity and a number of hotels in and around Glacier National Park.

The area from Whitefish to Missoula, identified as Flathead Valley Service Centres, contains highly developed destination resort areas with full services. Services on Montana Highways 200 and 141 between Missoula and Drummond are less numerous, but include two guest ranches and five outfitters which provide accommodation and meal services.

Montana Highway 1 through Drummond, Phillipsburg and Anaconda has services at regular intervals as well as campsites in Deerlodge National Forest, and a major four season resort near Anaconda. At the south end of the Trail there are three noted service centres: Boulder, Whitehall and Ennis providing full services including roofed accommodation, restaurants, gas and limited shopping. Numerous campgrounds exist on U.S. Highway 287 to West Yellowstone.

2.1.10 Loop Tours

Because of the length of the Trail of the Great Bear (2,085 miles or 3,350 kilometres), it will be difficult for most visitors to travel its entirety at one time. Furthermore, at some times of the year, some of the sections of the Trail may already be highly utilized and may not be able to absorb additional traffic during these peak periods.

To accommodate these factors it would be desirable to organize and promote certain sections of the Trail independently as loop tours, composed of sections of the Trail, and lasting anywhere from one to ten days duration. That way, visitors who might be in the area for other reasons, or those with limited vacation time could still enjoy a short vacation experience on the Trail of the Great Bear. Moreover, since some markets are located at considerable distance from Alberta and Montana, a good portion of their vacation time might be used in getting to the Trail itself, reducing their available time in the area. Shorter loop tours will provide an appealing opportunity to these markets, allowing them to add a visit on the Trail during their vacation.

There are other advantages to loop tours. They permit the overall Trail to be organized into sub-regions and involve communities and industry groups to form tourism committees responsible for assisting in the management and promotion of the loop tour in their area.

They also permit seasonal promotions of certain portions of the Trail of the Great Bear. For example, loop tours through areas which are heavily used in the peak summer season, might be promoted more heavily for spring and fall use, while underutilized sections could be given greater promotion during the peak period.

In summary, loop tours can:

- provide a basis for the management of the Trail of the Great Bear;
- satisfy the time constraints of a broader range of visitors;
- be promoted so as to direct traffic to or from specific areas at specific times of the year;
- bring into sharper focus the resources and attractions of specific areas, allowing them to be better packaged and promoted;
- encourage stops along the route and increase stays in the region;
- provide economic impacts to the region.

2.1.11 Loop Tour Criteria

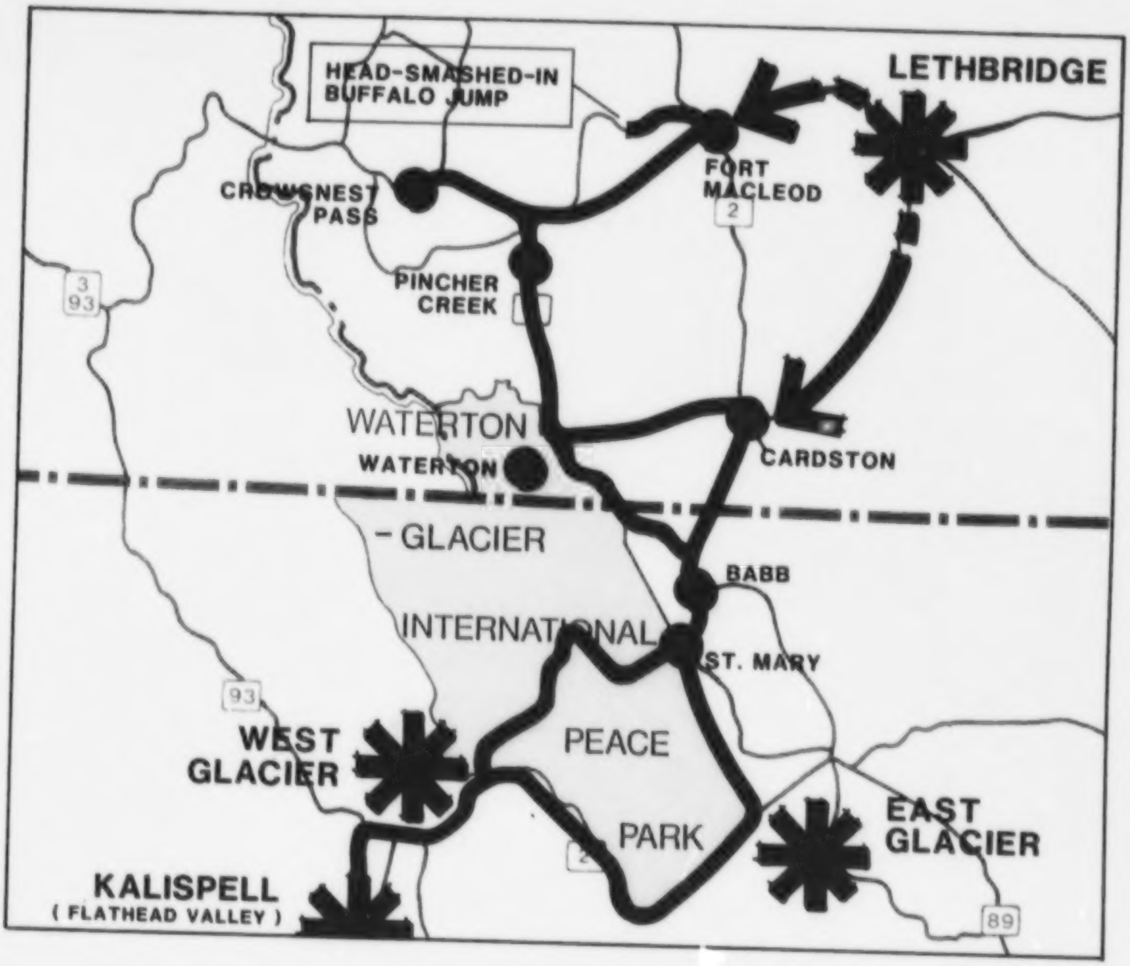
While the criteria for selecting and developing loop tours may vary for numerous reasons, the following guidelines should apply for loop tours developed for the Trail of the Great Bear:

- the loop tours should fall within the proposed corridor area;
- they should be accessed through one of the designated gateways;

- they should utilize the Trail of the Great Bear designated routes;
- they should return to the place of origin or another Trail of the Great Bear designated gateway;
- they should have access to more than one attraction on the loop;
- they should provide physical or visual access to the resources which are congruent with the Trail of the Great Bear, such as the natural resources, the historical resources or the cultural resources;
- they should provide opportunities for stopping along the route at regular rest stops, and view points;
- they should provide tourist services at regular intervals.

2.1.12 Loop Tour Example

An example of one possible loop tour is shown on Map 3. This loop tour would encompass the area between Lethbridge in Alberta and Kalispell in Montana. It could be accessed by any one of the four gateways of Lethbridge, East Glacier, West Glacier, and Kalispell. This loop tour would travel through an area which offers all of the resources described in the philosophy of the Trail of the Great Bear, including the historical resources to be found at Fort Macleod and Head-Smashed-In Buffalo Jump, the native cultural resources at and near the Peigan and Blood Indian reserves, and the natural resources in and around Waterton/Glacier National Park. In addition, this loop would provide a variety of tourism attractions and resources, particularly in Waterton and in the Kalispell/Flathead Valley area, with services being available at regular intervals along the route. This particular loop would provide excellent opportunities for joint venture promotion of Montana and Alberta as well as for the numerous communities and tourism industry operators in the area.



HEAD-SMASHED-IN BUFFALO JUMP
LETHBRIDGE
FORT MACLEOD
CROWSNEST PASS
PINCHER CREEK
3
93
2
WATERTON
WATERTON
CARDSTON
- GLACIER
BABB
INTERNATIONAL
ST. MARY
93
WEST GLACIER
PEACE
PARK
2
EAST GLACIER
KALISPELL
(FLATHEAD VALLEY)
89

LEGEND

━━ YEAR ROUND

━━ SEASONAL

REGIONAL GATEWAY/ SERVICE CENTRE

● SERVICE CENTRE

LOOP TOUR EXAMPLE

MAP 3

2.1.13 Needs of Visitors

The demand for services will create development. This will include signing, some road improvements, food services and accommodation, ease of access and other services such as gas stations, souvenir shops, parking areas and so on.

The requirement for signs identifying the Trail of the Great Bear, called Trailblazer signs, will be a priority. Other signs will include interpretive signs which should be located at view points and at areas of special interest to explain to visitors the nature or the significance of the resources they are viewing or experiencing. Directional signs to areas of particular attraction, to natural, historical and cultural resources or to service areas will also be needed.

Road improvements necessary will, for the most part, be focused on developing pulloffs and rest stops, as the roads selected for the Trail of the Great Bear may require little or no upgrading. Three types of pulloffs are required, including emergency pulloff areas, rest stops, and view points. Some of these pulloffs may be combined. Rest stops with picnic tables, barbecue pits and washrooms could be located at view points or at emergency pulloff areas. Pulloff areas should be equipped with emergency telephones. The location of these may vary according to various conditions such as terrain and access to land, but pulloffs should be available at approximately 50 mile or 80 kilometre intervals.

Access to the Trail from a number of points is also important to visitors arriving by air, rail or bus. The tour bus industry normally travels from point to point on fairly rigorous schedules and plan their itinerary around the location of accommodation and foodservices. For visitors travelling by automobile, ready availability of fuel, food, shops, emergency road services and medical care are also essential. Finally, while visitors to the Trail of the Great Bear may be primarily interested in its major natural, historical and cultural resources, families and groups will require variety and options and will demand the availability of man made attractions and tourist services during part of their vacation. These will include hotels and motels, restaurants, recreational facilities and activities.

Fortunately, many of the above are already located conveniently at various points along the Trail of the Great Bear. However, as the popularity of the Trail of the Great Bear increases, there will be a need to expand existing services, upgrade others, and to create new ones. These increasing needs will provide medium and long term opportunities for new developments.

2.1.14 Opportunities

The development of the proposed Trail of the Great Bear corridor to its full potential would both encourage and demand development of certain tourist services and infrastructure. Additionally, some development may be required in order to reach the objective of making this a four season corridor.

While the existence or deficiency of tourism resources may represent opportunities or constraints along the Trail, they should not in themselves be central to its eventual location. The environmental orientation of the theme suggests that the route which is developed be a response primarily to biophysical resources and natural landscapes, and to a lesser degree, to cultural and historic resources which represent man's use of that landscape. Environmental concerns must be addressed and areas where protective measures may be required, should be identified. The implementation and development of the Trail of the Great Bear could be used as a mechanism for creating awareness of environmental concerns and establishing networking systems whereby various groups and agencies can combine resources to address environmental concerns and issues.

The intent of Table II-2 is to identify potential opportunities for development for the Trail of the Great Bear. In this particular application, development refers to all types of visitor services, access methods, recreational opportunities and attractions. The development opportunities have been evaluated for the Trail as a whole and are not specifically referenced to any area. It may very well be that a particular resource is abundant in a specific area but when evaluating the Trail in its entirety, there is an overall lack of the resource. While existing facilities will accommodate the short term demand, it is conceivable that new facilities will be developed as demand warrants.

The existing services and the need for increased development has been rated as high, medium or low. Definitions of these terms for the purpose of this table are:

Existing Services

High - an ample supply of the services exist
Medium - there is a fair supply of the services
Low - there is a definite lack of the services

Need for Increased Development

High - there is a definite need for development of the service
Medium - there is some need for development of the service
Low - there is little or no need for further development of the services

In addition, the table identifies the primary seasonality of the services:

Spring/summer
Fall/winter
Four season

Also identified are possible constraints to development to any of the components.

The table illustrates that the proposed Trail, at present, has no areas which do not provide the resources necessary for tourism. The basic visitor requirements of food and shelter are available as are the necessary cultural/historic and natural attractions. Further expansion/interpretation of these resources is required and must be done within the guidelines and policies of the responsible agencies and/or organizations.

There are currently numerous recreational services available on a four season basis, however, opportunities exist for further development to increase four season utilization. Airline, rail and road service is in existence, but, there exists the possibility of future growth once demand warrants.

The development of the Trail of the Great Bear will take place over extended time periods, and not all parts of the Trail will develop at an even pace. Some sections and loops will develop faster than others due to many reasons such as community involvement and support, accessibility from major markets, success of packaging and promotional programs, and travel or tour industry support and interest. Consequently, the timing and location of development opportunities will vary accordingly.

The Trail of the Great Bear could encourage opportunities in addition to, or as a part of, the more commercial type of development. Numerous ecotourism opportunities exist within the tour corridor. In general terms, these are:

- restoration and preservation of cultural/historic sites;
- promotion of cultural/historic knowledge and respect thereof;
- promotion of appreciation and understanding of natural and wildlife resources, encouragement and preservation of same;
- venues or facilities that encourage contact between visitors and hosts.

TABLE II-2

TRAIL OF THE GREAT BEAR EXISTING SERVICES AND OPPORTUNITIES

Service	Existing Supply	Need for Increased Development	Seasonality of Service	Limitations
Campgrounds	High	Low	Spring/Summer	Demand must be present/seasonal
Airline Service	Medium	Medium	Four Season	Demand must be present
Rail Service	Medium	Low	Four Season	Demand must be present
Roadways	High	Low	Four Season	Funding limited for construction and upgrading
Winter Recreation (i.e. skiing)	High	Low	Fall/Winter	Environmental, demand must be present
Summer Recreation (i.e. hiking)	High	Low	Spring/Summer	Environmental, demand must be present
Visitor Information Centres	Medium	Low	Four Season	Funding sources limited
Cultural/Historic Site Interpretation	Medium	High	Spring/Summer	Funding sources limited, fragility of resources
Natural Site/Wildlife Interpretation	Medium	High	Four Season	Funding sources limited, fragility of resources
Hotels/Motels	Medium	Medium	Four Season	Demand must be present
Guest Ranches	Low	High	Spring/Summer	Demand must be present
Bed and Breakfast	Low	High	Four Season	Demand must be present
Retail Outlets	Medium	Medium	Four Season	Demand must be present
Restaurants	High	Low	Four Season	Demand must be present
Soft Adventure (i.e. rafting)	Low	High	Four Season	Environmental, demand must be present
Motor Coach Tours	Low-Medium	Medium	Spring/Summer	Short Season/want recognized destinations
Interpretive Tours	Low	High	Four Season	Demand must be present
Festivals/Events	Medium	Medium	Four Season	Must be a community supported event
Automobile Rental	Medium	Medium	Four Season >	Border crossing regulations need to be more conducive, one way drop off charges must be less discouraging.
Recreational Vehicle Rental	Low	Medium	Spring/Summer >	

2.1.15 Environmental Considerations

Tourism can have both detrimental and beneficial influences on the environment. Detrimental influences can include:

- the quality of an experience decreases once the number of visitors or facilities increases beyond the optimum level;
- excessive numbers of visitors can cause physical damage to sites and/or stress to wildlife;
- the character of sites is sometimes changed when facilities are added;
- additional people and the accompanying disposal problems can overburden the resources which have been developed to protect the environment, (i.e. sewage disposal plants).

Beneficial influences may arise from:

- authorities and local populations realize the value of the environment and therefore implement measures for its protection, with funding coming from the additional tourism revenue;

Some very basic methodologies which could be implemented to reduce detrimental environmental effects are:

- restricted/controlled access (prohibit or limit car access to sensitive areas, limit or restrict the volume of visitors allowed on a site at any one time, extend operating seasons/hours where possible to spread out the intensity of visitation);
- limiting development (prohibit or limit the construction of new roads or visitor facilities, limited license renewals);
- land use zoning (where applicable protect the land use by zoning regulations);

- encourage developments to be planned, constructed and operated in an environmentally sound manner;

- re-direct usage (provide alternatives to heavily used resources, draw away from areas already heavily impacted);

- where appropriate, encourage year round use (hold festivals, special events throughout the year to encourage use other than during prime time).

There are two recognized conservation strategies in Alberta that should also be given consideration. The Alberta Conservation Strategy project arose from the publication of the World Conservation Strategy in 1980. A Strategic Framework in Brief, draft form was released in April 1990. The World Conservation Strategy (WCS) was the result of a joint effort by the United Nations Environment Program, the International Union for the Conservation of Nature and Natural Resources (IUCN), and the World Wildlife Fund. The World Conservation Strategy argues that if humans are to have a sustainable future, economic activity must be based on sound environmental management.

The Government of Canada, with the support of the provinces, endorsed the World Conservation Strategy in 1981. Early in 1985, the Public Advisory Committee (PAC) to the Environment Council of Alberta launched the Alberta Conservation Strategy (ACS) project, and a year later published the "Prospectus for an Alberta Conservation Strategy.

A common issue raised throughout the numerous contacts with the public during the course of this study was concern for the environment and means of providing protection. Some concerns identified were site specific while others addressed large areas of land. A process must be established for addressing such concerns with local communities and environmental groups so that the problems are identified and resolutions made before they become issues.

By providing a networking system for agencies, associations and individuals charged or concerned with environmental protection, the Trail of the Great Bear could serve as a model in ecotourism. The fact that two of the national parks associated with the Trail are UNESCO World Heritage Sites should also provide some direction when addressing environmental concerns as would the fact that Waterton/Glacier form an International Peace Park and both are considered Biosphere Reserves.

It is obvious that each area of the Trail has its own unique resources and accompanying environmental concerns that should be addressed in detail prior to further development.

2.2 MARKET DEMAND

This section briefly outlines who are the prime markets for the Trail of the Great Bear concept, the viability of the concept for these markets, and the potential number of visitations that could be attained once the Trail is fully developed. This is a long term project that will require many years of growth and development to achieve a fully developed Trail. As a new product, demand will need to be stimulated as addressed in the marketing strategy.

Given the nature of the proposed corridor concept, the level of detail presented pertaining to the markets has been researched as specifically as possible at this time. It should be understood that the management organization for the Trail of the Great Bear will be required to conduct more specific research at a micro level at a later date to quantify and segregate the market segments identified.

2.2.1 Market Segmentation for the Trail

The key markets of importance for the Trail were identified and segmented from three different perspectives: geographic origin, trip purpose and mode of transport. These segments are not mutually exclusive, and consequently travellers may fit into one or more segments with overlapping characteristics. Within each of these market segments, a number of further delineated categories called sub-segments were ranked in order of importance based on the following criteria:

- length of stay
- expenditures
- origin
- size of the market
- seasonality
- trip purpose
- mode of transportation

2.2.2 Key Markets by Geographic Origin

The market segments for Trail of the Great Bear have been presented in terms of both existing markets and potential markets by geographic origin. The existing markets are indicated in Table II-3 as follows:

TABLE II-3

EXISTING MARKET SEGMENTATION BY GEOGRAPHIC ORIGIN FOR PROPOSED CORRIDOR IN RANK ORDER *

Market Type	Alberta	Montana
Primary	• Alberta • Montana • British Columbia • Saskatchewan	• Montana • Alberta • Pacific Coast States • Mountain States • North Central States
Secondary	• Other Canada (1) • Other United States (3)	• Other United States (4) • Other Canada (2)
Tertiary	• Japan • United Kingdom • Germany • Other Overseas (5)	• United Kingdom • Germany • Japan • Other Overseas (5)

Source: Pannell Kerr Forster research

Note: Primary markets represent the strongest existing markets to the proposed corridor area and the province/state. Secondary and tertiary markets represent more long term markets to be developed for the corridor area.

* The existing market segments were rank ordered in terms of the current size of the market visiting Alberta and Montana.

Key Assumptions for Table II-3 and Table II-4

(1) Other Canada includes Manitoba, Ontario and Quebec for the Alberta portion of the Trail.

(2) Other Canada includes British Columbia, Saskatchewan, Manitoba, Ontario and Quebec for the Montana portion of the Trail.

(3) Other United States includes the Pacific Coast, Mountain, North Central, South Atlantic, South Central and North Eastern regions for the Alberta portion of the Trail.

(4) Other United States includes the South Atlantic, South Central and North Eastern regions for the Montana portion of the Trail.

(5) Other Overseas includes remaining European (i.e. France), the South Pacific, and the South East Asian markets.

The potential market segments for the Trail of the Great Bear are presented in Table II-4 as follows:

TABLE II-4

POTENTIAL MARKET SEGMENTATION BY GEOGRAPHIC ORIGIN FOR PROPOSED CORRIDOR IN RANK ORDER *

Market Type	Alberta	Montana
Primary	• Montana • British Columbia • Saskatchewan	• Alberta • Pacific Coast States • Mountain States • North Central States
Secondary	• Germany • Japan • United Kingdom	• Germany • United Kingdom • Japan
Tertiary	• Other Canada (1) • Other United States (3) • Other Overseas (5)	• Other United States (4) • Other Canada (2) • Other Overseas (5)

Source: Pannell Kerr Forster research

* The potential market segments were evaluated based on a number of criteria including length of stay, expenditures, origin, size of the market, seasonality, trip purpose and mode of transport. Section 3.4.3 explains these criteria in detail.

The identification of potential market segments has concentrated on the non-resident markets since they will generate new revenues into the province/state. The economic impact projections presented in Section 2.3 are, therefore, limited to visitors from outside Alberta and Montana. An underlying assumption, based upon study research, has been that the concept will be developed over a long term. Selection of potential markets has, therefore, taken this long term growth into consideration. The overseas travellers represent strong potential markets for long term tourism benefits to the province/state.

It is recognized, however, that the resident travel market which is attracted to, and will travel within, the Trail of the Great Bear Corridor will assist in stopping tourism revenue leakages outside the province/state. They will also be important for initial/short term marketing of the concept. Increased cross-border visitation between the province/state should also occur with implementation of the concept.

Viability of the Concept - Geographic Origin

The most important potential markets for the Trail would be the surrounding provinces and states to the corridor area. Research indicates that for the Alberta portion of the Trail, residents of Montana, British Columbia and Saskatchewan would show a strong interest in visiting Banff National Park and its surrounding area. Canadians from other provinces and American travellers would also seek touring routes such as this one provided the Trail could offer some unique attractions that distinguish it from other scenic corridors. A large attraction on the route, for instance, could lure the regional and urban markets to the Trail as well as increase their awareness of the corridor area.

Similarly for the Montana portion of the Trail, it is evident that marketing should be focused towards the Pacific Coast, Mountain and North Central States primarily, and the Alberta travel markets. These markets currently represent the majority of visitations to Montana. The close proximity of the Trail for the Alberta market is also a strong selling point. The concept would appeal to other Americans travelling to Montana who participate in activities that can easily be offered on the loop tours such as: hiking, visiting historic sites, auto touring and recreational vehicle camping.

Over the long term, however, the overseas markets, and more specifically those seeking "culture and nature" should be targeted. Certain overseas markets are more likely to take extended vacations and typically have higher expenditures on a daily basis than national travel markets. The increase in overseas tourism flow also helps to lower the Canadian and United States deficit in the travel account of the balance of payments.

2.2.3 Key Markets by Trip Purpose/Mode of Transport

While segmentation by geographic origin provides some insight into the characteristics of potential markets for the Trail, a division of markets by their actual trip purpose and/or mode of transport provides a deeper understanding of the potential Trail of the Great Bear traveller. As presented in Table II-5, in terms of trip purpose, national parks visitors represent the most viable market followed by special interest groups. In terms of mode of transport, the private automobile touring market followed by recreational vehicle owners and fly and drive travellers would be key target markets. The motor coach tour operators could foresee increased demand for this route once the upgraded facilities are in place.

Table II-5 illustrates the most viable markets for the Trail in descending order in terms of the purpose and mode of transport.

TABLE II-5

MARKET SEGMENTATION BY TRIP PURPOSE/ MODE OF TRANSPORT

Trip Purpose	Mode of Transport
1) National Parks	1) Private Automobile
2) Special Interest Groups	2) Recreational Vehicle-owner
3) Attractions/Special Events	3) Fly and Drive
4) Visiting Friends and Relatives	4) Recreational Vehicle-rental
5) Short Getaway	5) Motor Coach Tours
6) Group Touring	

Source: Pannell Kerr Forster research

For a more detailed description of these markets, refer to Section 3.4 of this report.

Viability of the Concept - Trip Purpose/Mode of Transport

In terms of trip purpose, national parks visitors offer strong potential for the Trail as they represent a captured market with a strong focus on natural features (wildlife, fauna, mountains) that can be found along the Trail of the Great Bear. In order to draw visitors away from the national parks in the peak season to various nodes along the route, the promotional material for the Trail needs to emphasize its unique and distinct attractions within potential loop tours.

The advantages of shoulder season travel as an alternative or complement to summer travel should also be emphasized. Special interest groups also have travel characteristics that are congruent with the proposed corridor. This type of tourism attracts a small number of affluent tourists with specific interests in activities available en route such as wildlife viewing, backcountry skiing, mountain climbing, fishing and so on. One special interest group, namely ecotourists, are particularly compatible with the Trail's concept with their concern and knowledge about nature conservation and their desire for "soft adventure" tourism in a natural, wildlife setting.

The most important segment by mode of transport for the Trail is the private automobile touring market. Over 86% of personal travel in North America is by private automobile, and a new scenic touring route, such as the proposed corridor, would offer these travellers a specific route on which to experience their pleasure travel holiday. Similarly, recreational vehicle owners, especially seniors with time and money to spare, could cover a wide spectrum of the Trail over an extended vacation period provided ample sightseeing opportunities, cultural and natural sites were accessible.

The fly and drive travellers represent a distinct "non-local" market for the Trail. This option would be most viable to overseas travellers, especially from Germany and the United Kingdom, as well as Americans from the Eastern Coast and the Pacific Northwest areas.

For more detail on each sub-segment by the three forms of segmentation, refer to the support information in Section 3.4 of this report.

2.2.4 Potential Number of Visitations for the Trail

The development of the Trail would draw on existing visitors to Alberta and Montana, as well as attract new visitors to the proposed corridor area. The incremental visitations to the corridor area were analyzed separately for the Alberta and Montana portions of the route, and the existing tourism flow to the province/state was used as a base to assess incremental visitation as detailed in Table II-6 and Table II-7.

In addition, the proposed scenic touring route could attract new visitors who would not have otherwise travelled the corridor area. To determine the increase in visitations for the key geographic segments, population statistics and data forecasts of potential pleasure travel markets to North America were utilized as a basis. Capture ratios were then assigned to these figures to calculate the incremental potential from new visitations along the entire route as detailed in Table II-8 and Table II-9. Refer to the support information Section 3.4 of this report for a detailed explanation of this procedure.

The capture ratios were determined by a number of factors such as the region of origin, the distance of travel to the Trail, and the overall market trends for specific regions.

TABLE II-6

ALBERTA
POTENTIAL (LONG TERM) INCREMENTAL VISITATION TO THE TRAIL FROM CURRENT VISITORS TO PROVINCE
(person visits per year)

Market Segment	Existing Visitation	Length of Stay	Increase - Day Use	Increase - Overnight Use	Total Increase
Canada *	2,544,000 *	1.7	254,400	381,600	636,000
United States	1,441,000	2.0	72,050	72,050	144,100
Overseas	399,000	2.0	39,900	59,850	99,750
Total	4,384,000		366,350	513,500	879,850

Source: Alberta Tourism, Pannell Kerr Forster research

* Excludes visitations by Albertans within the province.

Assumptions:

1. Potential incremental visitation concentrates on the non-resident market segments since they will generate new revenues into the province. The Alberta resident markets which are attracted to the corridor will, however, assist in stopping tourism revenue leakages outside of the province.

2. Assumes a stabilized year in which the concept is fully operational, thus the market focus is on long term markets with long term projections. This stabilization may take up to 50 years to occur.

3. Length of stay is an estimate of how long each market will spend along the Trail.

4. Overnight stay is presumed to be one or more nights.

5. Mathematical calculations for incremental visitations were derived as follows:

Existing Visitation x Incremental Percentage Day Use/Overnight Use * = Increase - Day Use/Overnight Use

* Incremental percentages are detailed for each market segment in Section Three of this report.

TABLE II-7

MONTANA
POTENTIAL (LONG TERM) INCREMENTAL VISITATION TO THE TRAIL FROM CURRENT VISITORS TO STATE
(person visits per year)

Market Segment	Existing Visitation	Length of Stay	Increase - Day Use	Increase - Overnight Use	Total Increase
United States	4,510,800 *	1.7	225,540	225,540	451,080
Canada	564,200	2.0	56,420	84,630	141,050
Overseas	25,000	2.0	2,500	3,750	6,250
Total	5,100,000		284,460	313,920	598,380

Source: 1988 Montana Travel Survey; Pannell Kerr Forster research

* Excludes visitations by Montana residents within the state.

Assumptions:

1. Potential incremental visitation concentrates on non-resident market segments since they will generate new revenues into the state. The Montana resident markets which are attracted to the corridor will, however, assist in stopping tourism revenue leakages outside of the state.

2. Same assumptions as for Alberta (2, 3, 4, 5, in Table II-6).

TABLE II-8

POTENTIAL NEW VISITATIONS (LONG TERM) FROM NORTH AMERICA ENTIRE TRAIL OF THE GREAT BEAR ROUTE *

(Person Visits Per Year)

Market Segment	Population Base	Capture Ratio**	Incremental Visitation	Length of Stay	Increase Day Use	Increase Overnight Use
Canada						
West	4,127,000	1.0%	41,270	2.0	16,508	24,762
Central	17,548,000	0.1%	17,548	2.0	7,019	10,529
East	2,316,000	0.1%	2,316	2.0	926	1,390
Sub total	23,991,000		61,134		24,453	36,681
United States						
Pacific	37,135,000	0.2%	74,270	2.0	29,708	44,562
Mountain	12,502,000	0.2%	25,004	2.0	10,002	15,002
North Central	59,894,000	0.1%	59,894	2.0	23,958	35,936
Other	135,020,000	0.01%	13,549	2.0	5,420	8,129
Sub total	245,020,000		172,717		69,088	103,629
Total North America	269,011,000		233,851		93,541	140,310

* Assumes a stabilized year in which the concept is fully operational.

** Capture ratios are explained in detail in Section Three of the report.

TABLE II-9

POTENTIAL NEW VISITATIONS (LONG TERM) FROM OVERSEAS ENTIRE TRAIL OF THE GREAT BEAR ROUTE *

Market Segment	Potential Market***	Capture Ratio**	Incremental Visitation	Length of Stay	Increase Day Use	Increase Overnight Use
Overseas						
Japan	2,300,000	0.5%	11,500	2.0	4,600	6,900
United Kingdom	750,000	0.5%	3,750	2.0	1,500	2,250
France	950,000	0.5%	4,750	2.0	1,900	2,850
Germany	1,900,000	0.5%	9,500	2.0	3,800	5,700
Total Overseas	5,900,000		29,500		11,800	17,700

Source: Pannell Kerr Forster research

* Assumes a stabilized year in which the concept is fully operational.

** Capture ratios are explained in detail in Section Three of the report.

*** Potential markets represent the entire 'culture and nature' travel segment who would have a propensity to seek features such as those to be included along the Trail.

2.3 ECONOMIC IMPACT ANALYSIS

2.3.1 Purpose of the Analysis

The purpose of this analysis is to establish the potential economic impact of the development of the Trail of the Great Bear on the province of Alberta and the state of Montana.

2.3.2 Approach to the Analysis

The potential economic impact of the proposed scenic corridor on the region (Alberta and Montana) can be estimated using an economic impact model and approach. It is important to understand, however, the context in which such impacts should be considered.

A highway is normally categorized as infrastructure, and not as a tourism generator. In the case of a scenic touring highway, however, the fact that the highway itself creates the access to the tourism opportunities makes the highway part of the tourism generator. In the pages following, the scenic touring route is considered to be part of the tourism generator to the region. It will significantly increase the tourism generating power of the area. It will do so, however, in concert with other attractions and service developments, and with provincial, state, private sector and regional promotion of the area as a destination region. Thus, the highway is one major component of the tourism destination attraction, but not the only component.

In order to assess the total potential economic impact of the Trail of the Great Bear, the impact on Alberta and Montana has been assessed independently. The methodology used will be the same for each region.

To fully understand the economic impact, it is essential to outline the methodology, assumptions and limitations as detailed below.

2.3.3 Methodology

The methodology considered for the development of the Trail of the Great Bear includes direct, indirect, and induced effects. Direct effects are those generated as a direct consequence of travel activity in the area. Travel expenditures become business receipts. Visitor use of recreation areas requires expenditures on services for the visitors (capital developments). These are considered direct costs. These benefits and costs are directly related to the travel activity.

In addition, there are indirect or secondary effects of travel activity. On the benefit side, businesses spend part of their receipts on wages and goods and services they require to serve customers, including investment in new equipment and structures.

The other type of secondary benefit is induced. Induced benefits include consumption spending of the wage and salary income directly generated by the travel expenditures on goods and services.

Secondary costs of travel relate to the public goods and services required to serve those businesses and employees that are impacted at the secondary level.

Appendix I of this report details the economic impact model and its calculations for both Alberta and Montana. The section below summarizes the assumptions used to arrive at construction and operation costs, visitor expenditures and income and employment impacts generated by the development of the Trail.

2.3.4 Assumptions

Some of the general assumptions made for the economic impact analysis include:

1. Visitation estimates are based upon a fully developed Trail which could take up to 50 years. For the purposes of the economic impact assessment, visitation and expenditure projections are based on long term aspects. The analysis is limited to non-resident markets since they will generate new revenues into the province or state. It is recognized, however, that resident markets will assist in stopping tourism revenue leakages outside of the province or state.

2. All dollar figures shown are in 1990 Canadian dollars. For Montana, U.S. dollar figures have been included in addition to Canadian dollars.

3. Capital and operating costs of the highway could be considered public ones and include those costs relating to signage and roadside pulloff construction and maintenance above and beyond those capital and operating costs that currently exist. The proceeding analysis does not consider the costs of road upgrading improvements nor the construction of access roads.

4. Private costs could relate to the construction and operation of tourism services and facilities along the Trail. For the purposes of this study private sector costs have been termed "induced private sector facilities". These facilities are those that will be built as demand warrants.

5. The impact of recreational opportunities such as outfitting operations, river rafting, guiding and so on have not been considered in this analysis. These benefits could not be estimated accurately at this time as they relate to the longer term growth of the region as a destination.

6. The route length for the assessment includes alternate routes and loops. The route length for Alberta is 770 kilometres (480 miles) and for Montana is 2,580 kilometres (1,605 miles).

2.3.5 Limitations to Analysis and General Observations

The scope and accuracy of the analysis and findings included in this study are limited by the preliminary nature of the information and projections currently available.

The study team would like to make some general observations regarding the adequacy of information upon which economic impacts of tour corridors/scenic highways such as Trail of the Great Bear can be examined. First, minimal efforts currently exist to monitor actual impacts of existing tour corridors/scenic highways throughout North America. Impact evaluations are largely based on hypotheses regarding various economic variables and projections.

In addition, the economic impact assessment presented herein assumes that the Trail is fully developed and full injection is made into the economy in 1990 dollars.

However, uncertain market conditions which may influence infrastructure and development requirements, may cause the development to take place in phases of up to a 50 year period.

2.3.6 Alberta Economic Impacts

The economic impacts of the development of the Trail on Alberta was done by examining each route segment, loop and seasonal alternate independently and assessing requirements in relation to the entire route. The economic impact analysis as detailed below is divided into the following sections:

a. Estimated Construction Costs (Public & Private)
b. Estimated Operating Costs (Public & Private)
c. Estimated Visitation and Expenditures
d. Total Income and Employment Impacts
e. Taxation Impacts.

Each section is detailed below.

a. Estimated Construction Costs

The capital costs associated with the development of the Trail of the Great Bear include:

- costs for signing;
- costs to build roadside pulloffs; and
- expenditures required to develop induced private sector facilities.

Signing

Information on signing requirements was derived through the inventory, comparative research with other scenic tour corridors, and through interviews with representatives from Alberta Transportation and Utilities and Alberta Culture and Multiculturalism. Research revealed three types of signs may be required for the Trail. These include:

1) Trailblazer Signs - signs which bring travellers from major transportation routes or terminals to the Trail of the Great Bear. Typical costs for trailblazer signs are between $60 and $75 per sign;

2) Point of Interest Signs - signs which identify and interpret key features and points of interest. Typical costs for destination signs are estimated to be $1,250/sign at the time of the research, and may be regarded as the lowest end estimates;

3) Destination Signs - highway signing which informs motorists of destinations and distances.

An estimate of costs for the signing is summarized in Table II-10:

(Note: Destination signs have not been included in Table II-10 as they do not appear to be critical to Trail of the Great Bear.)

TABLE II-10

SIGNING COST ESTIMATES
TRAIL OF THE GREAT BEAR
ALBERTA PORTION

Signage	Estimated Cost
48 - 50 Trailblazer signs (Assume one every 16 km - 10 miles @ $60/sign)*	$ 2,880
Approximately nine point of interest signs (4' X 8' @ $1,250/sign)	$11,250
Total	$14,130

Source: Pannell Kerr Forster research;
Alberta Department of Transportation and Utilities

* The low end of estimates for Trailblazer signage from Alberta Transportation and Utilities was utilized for the economic impact analysis.

It should be noted that signing will have to be located in accordance with the Transportation Department's guidelines and policies.

Pulloffs

As part of the economic impact assessment and the development of the Trail, roadside pulloffs will be required above and beyond those that currently exist. These pulloffs will provide motorists with the opportunity to view scenic features, read interpretive plaques and allow the opportunity for picnic and rest stops. Research revealed that two levels of pulloffs should exist. Level one would be the standard pulloffs with the following features:

- paved (20 cars)
- garbage can/picnic table
- signing (highway)

For the purpose of this analysis, it has been assumed that level one pulloffs will be situated about every 80 kilometres (50 miles). Level two pulloffs are more deluxe and will be strategically located about every 320 kilometres (200 miles). Level two pulloffs should include:

- paved (40 cars)
- garbage can/picnic table
- signing (highway)
- washrooms

The pulloffs proposed should be situated at sites that can be physically developed for this purpose. Safety features must also be addressed when deciding upon the location for the pulloffs.

The following table details the cost estimates relating to the pulloffs. Cost estimates were derived from Alberta Transportation and Utilities. The costs shown in Table II-11 are low end estimates based upon basic design criteria.

TABLE II-11

ROADSIDE PULLOFF COST ESTIMATES
TRAIL OF THE GREAT BEAR
ALBERTA PORTION
(FOR NEW PULL-OFFS REQUIRED)

Pulloffs	Estimated Cost
9 level one pulloffs ($35,000 each)	$315,000
2 level two pulloffs ($80,000 each)	$160,000
Total	$475,000

Source: Pannell Kerr Forster research;
Alberta Department of Transportation and Utilities

Tourism Services

The development of the Trail of the Great Bear will result in increased visitation to both the province of Alberta and the state of Montana, especially during the summer months. Research has revealed that some tourism facilities and services situated at either end of the Trail in Banff National Park and Yellowstone National Park as well as facilities located in Kananaskis Country and Waterton Lakes National Park are at full capacity during the summer months. In addition, areas currently exist along the Trail where tourism facilities are limited.

An increase in tourism traffic will necessitate the construction and upgrading of facilities along the Trail. The development and upgrading of tourism services and facilities will be dependent upon future levels of tourism demand. For the purposes of this analysis, the services required will be termed "induced private sector facilities".

The following estimates have been identified and are based upon a fully developed Trail. Note that demand levels which will ultimately influence service requirements are dependent upon success in marketing, management and availability of funds. Hence, the number shown below is based upon the assumption that the Trail is able to achieve the visitation levels projected in Section 3.4. The induced private sector facility costs resulting from the development of the Trail in Alberta are estimated to be $16.5 million.

Table II-12 details the total direct capital costs relating to the Alberta portion of the Trail of the Great Bear.

TABLE II-12

CAPITAL COST ESTIMATE
TRAIL OF THE GREAT BEAR
ALBERTA PORTION

Induced Private Sector Facilities	$16,500,000
Pulloffs	$475,000
Signing	$14,130
Total	$16,989,130

Source: Pannell Kerr Forster research

The public portion of this cost includes the signing and the pulloffs. It is assumed that the service infrastructure will be privately developed.

b. Estimated Operating Costs

The costs associated with the operation of Trail of the Great Bear include:

- public costs associated with signing and pulloff maintenance plus the additional costs required for highway maintenance as a result of incremental visitations; and
- private costs associated with the operation of the services.

These costs are detailed in Table II-13:

TABLE II-13

ANNUAL OPERATING COST ESTIMATE
TRAIL OF THE GREAT BEAR
ALBERTA PORTION

Highway Maintenance	$300,000
Induced Private Sector Facilities	$2,325,000
Total	$2,625,000

Source: Pannell Kerr Forster research

Typical maintenance cost data were obtained from Alberta Transportation and Utilities. For a highway facility such as the proposed tourism route, typical annual maintenance costs average between $4,400 and $4,600/two lane km. These costs represent the yearly cost of performing such operations as surface maintenance, structures (bridges and drainage facilities) upkeep, road sign repairs, line painting, snow removal and sanding. For the recommended route, the yearly maintenance costs have been calculated on the basis of incremental visitation. It is estimated that the maintenance costs for the Alberta portion of the Trail of the Great Bear route will be $300,000 over and above the current maintenance costs.

The operating costs associated with the development of the induced private sector facilities are estimates based on industry standards. It is assumed these costs would be incurred by the private sector.

c. Estimated Visitation and Expenditures

The development of Trail of the Great Bear would result in incremental visitation to the area by drawing on existing visitors, and by attracting new visitors to the area. The incremental visitation numbers derived in Section 2.2 were used as a base to calculate the direct expenditure estimates. The incremental visitation includes visitation from the existing and potential markets, and is based on visitors from outside Alberta, since they will bring new revenues into the province. Table II-14 summarizes the estimated visitor expenditures based on these markets for the Alberta portion of Trail of the Great Bear.

Visitor expenditure estimates have been calculated by geographic market segment. Visitor expenditure are estimates based upon data obtained from Statistics Canada and the 1982 Alberta Travel Survey.

Table II-14 shows that the additional 1.6 million person days annually drawn to Alberta, in part as a result of the Trail of the Great Bear development, will generate an estimated $51 million in annual direct visitor expenditures.

d. Income and Employment Impacts

Based upon the Economic Impact Model, the results of which are presented in Appendix I of this report, the total economic impact of developing the Alberta portion of Trail of the Great Bear and its services is estimated at $28.0 million in one-time construction costs and 252 person years in construction-related employment spread over a development period of up to 50 years.

TABLE II-14

ESTIMATED VISITOR EXPENDITURES
TRAIL OF THE GREAT BEAR
ALBERTA PORTION (1990 $)
(LONG TERM NON-RESIDENT MARKETS)*

Markets		Total Incremental Visitation	X	Length** of Stay	=	Total Person Day Visitation	Direct Expenditures Per Capita	Total Direct Expenditures
Other National:	Day Use	291,080	X	1	=	291,080	$12.00	$3,492,960
	Overnight	406,054	X	1.7	=	690,292	$30.00	$20,708,754
	Total					981,372	$24.66	$24,201,714
United States:	Day Use	158,409	X	1	=	158,409	$11.00	$1,742,499
	Overnight	158,408	X	2	=	316,816	$55.00	$17,424,880
	Total					475,225	$40.33	$19,167,379
Overseas:	Day Use	48,750	X	1	=	48,750	$11.00	536,250
	Overnight	80,500	X	2	=	161,000	$50.00	$8,050,000
	Total					209,750	$40.93	$8,586,250
Total	Day Use	498,239				498,239	$11.58	$5,771,709
	Overnight	644,962				1,168,108	$39.53	$46,183,634
	Total	1,143,201				1,666,347	$31.18	$51,955,343

Source: 1982 ATS; 1988 CTS; Alberta Tourism

* New revenues generated into the province by non-resident markets.
** Length of stay is an estimate of how long each market will spend along the Trail of the Great Bear.

Note: Numbers may not add due to rounding.

The total annual income impact resulting from the development of the Trail of the Great Bear (Alberta portion) is estimated at $86.5 million in both public and private sector income for the province and 1,802 person years in jobs. The total annual income impact will accrue to the province once the Trail is fully developed.

Public Costs

Based on the assumptions of the model, the total economic impact does not separate "public" impacts from "private" impacts. Thus the total economic benefit to Alberta annually is $86.5 million and 1,802 person-years of employment.

The public costs associated with these economic impacts, however, have been identified. The total cost of the highway signage and pulloffs is estimated to be $489,130. This would be a public cost. The publicly funded operating cost would be $300,000 per year. These operating costs include labour and materials.

Long Term Benefits

In addition to those benefits which have been estimated in this report, additional benefits will accrue to Alberta in time. These benefits could not be estimated accurately at this time, as they relate to the longer term growth of the region as a destination.

As tourism visitation grows in the region, the Trail of the Great Bear would increasingly become a focus for tourism activity development. Outdoor recreation activities, guides and outfitters, river touring operations, commercial interpretive opportunities, and other income and employment generating forms of tourism development could occur.

While these additional tourism services may be long term potential opportunities, it is believed that if the Trail of the Great Bear positions itself to be as successful as estimated, these business opportunities would follow in the future.

e. Taxation Impacts

The revenues generated by the development of the Trail of the Great Bear also benefit government through a variety of taxation sources. Tourism Canada currently estimates Alberta tourism derived tax benefits using a tax co-efficient of 0.17 for provincial and municipal taxes combined (9.5% accrues to the provincial government and 7.5% to the municipal government).

Thus, the taxation impact of Trail of the Great Bear after the construction phase is complete is 17% of the total annual Alberta impact or $14.7 million per year to the provincial and municipal governments.

2.3.7 Montana Economic Impacts

The economic impacts of the development of the Trail on Montana were calculated in essentially the same way as they were for Alberta. Each route segment, loop and seasonal alternate was analyzed to determine infrastructure and other service requirements. The economic impact analysis as detailed below will be divided into the following sections:

a. Estimated Construction Costs
b. Estimated Operating Costs
c. Estimated Visitation and Expenditures
d. Total Income and Employment Impacts
e. Taxation Impacts.

Each section is detailed below. All dollar figures presented are in 1990 Canadian and American dollars. The American dollar conversion rate used is 1.17 as of September 24, 1990.

a. Estimated Construction Costs

The capital costs associated with the development of the Trail of the Great Bear include:

- costs for signing;
- costs to build roadside pulloffs (rest areas and turnouts); and

- expenditures required to develop highway services.

Signing

Information on signing requirements was derived through the inventory, comparative research with other scenic tour corridors and through interviews with representatives from the Montana Department of Highways. As noted in Section 2.3.6, research revealed three types of signs may be required for the Trail. These include:

1) Trailblazer Signs - signs which bring travellers from major transportation routes or terminals to the Trail of the Great Bear;

2) Point of Interest Signs - signs which identify and interpret key features and points of interest;

3) Destination Signs - highway signing which informs motorists of destinations and distances.

An estimate of costs for the signing is summarized below:

Note: Destination signs have not been included in Table II-15 as they do not appear to be critical to Trail of the Great Bear.

TABLE II-15

SIGNING COST ESTIMATES TRAIL OF THE GREAT BEAR MONTANA PORTION

Signage	Estimated Cost (Cdn. $)*	(U.S. $)
160 Trailblazer signs (Assume one every 16 km - 10 miles @ $144 Cdn./sign, $123 U.S./sign)	$23,040	$19,680
Approximately 40 point of interest signs (Estimated cost of $1,725 Cdn./sign, $1,474 U.S./sign)	69,000	58,960
Total	$92,040	$78,640

Source: Pannell Kerr Forster research; Montana Department of Highways

* Conversion rate used $1.17

It should be noted that signing will have to be located in accordance with transportation department guidelines and policies. It is also recommended that highway signing in Montana and Alberta be consistent in terms of style, colour, logo and text.

Pulloffs

As part of the economic impact assessment and the development of the Trail, roadside pulloffs will be required above and beyond those that currently exist. In Montana, roadside pulloffs are known as turnouts or rest areas. However, for the purpose of this analysis, the term pulloffs will be used. Pulloffs will provide motorists with the opportunity to view scenic features, read interpretive plaques and allow the opportunity for picnic and rest stops. As in the case with Alberta, two levels of pulloffs should exist in Montana. Level one would be the standard pulloffs or turnouts and could include the following features:

- paved (20 cars)
- garbage can/picnic table
- signing

For the purpose of this analysis, it has been assumed that level one pulloffs will be situated about every 80 kilometres (50 miles). Level two pulloffs are more deluxe and will be strategically located about every 320 kilometres (200 miles). Level two pulloffs could include:

- paved (40 cars)
- garbage can/picnic table
- signing
- washrooms.

Table II-16 details the cost estimates relating to the pulloffs.

TABLE II-16

ROADSIDE PULLOFF COST ESTIMATES
TRAIL OF THE GREAT BEAR
MONTANA PORTION
(FOR NEW PULLOFFS REQUIRED)

Pulloffs	Estimated Cost (Cdn. $)	Estimated Cost (U.S. $)
32 level one pulloffs ($11,500 Cdn./each - $9,829 U.S./each)	$ 368,000	$ 314,530
8 level two pulloffs ($57,500 Cdn. each - $49,145 U.S. each)	460,000	393,163
Total	$ 828,000	$ 707,693

Source: Pannell Kerr Forster research; Montana Department of Highways

- Conversion rate used $1.17

The location of the pulloff areas will be dependent upon the Department of Highways policies and guidelines and upon safety features. In addition, the scenic quality of the area will be an important determinant for the location of the pulloffs. The number of pulloffs presented in Table II-16 are estimated based upon regularly spaced viewpoints. This number may vary according to the Highway Department's guidelines and policies.

Highway Services

Increased visitation along the Trail will cause expansion, upgrading and development of new tourism facilities and services in Montana as well. As in Alberta, the development and upgrading of tourism services and facilities in Montana will be dependent upon future levels of tourism demand, promotion and management. The induced private sector facility costs for Montana have been estimated at $24.8 million Cdn. or $21.2 million in American dollars.

Table II-17 details the total direct capital costs relating to the Montana portion of the Trail of the Great Bear.

TABLE II-17

CAPITAL COST ESTIMATE
TRAIL OF THE GREAT BEAR
MONTANA PORTION

	Cdn $	U.S. $
Induced Private Sector Facilities	$24,800,000	$21,196,581
Pulloffs	828,000	707,692
Signing	92,040	78,667
Total	$25,720,040	$21,982,940

Source: Pannell Kerr Forster research

b. Estimated Operating Costs

The costs associated with the operation of Trail of the Great Bear include:

- costs associated with signing and pulloff maintenance plus the additional costs required for highway maintenance as a result of incremental visitations; and
- costs associated with the operation of the services.

These costs are detailed in Table II-18 below:

TABLE II-18

ANNUAL OPERATING COST ESTIMATE
TRAIL OF THE GREAT BEAR
MONTANA PORTION

	Cdn. $ *	U.S. $
Highway Maintenance	$ 660,000	$ 564,103
Induced Private Sector Facilities	2,870,000	2,452,991
Total	$ 3,530,000	$ 3,017,094

Source: Pannell Kerr Forster research

* Conversion rate of $1.17

Typical maintenance cost data were derived from the Montana Department of Highways. It is estimated that the maintenance costs for the Montana portion of the Trail of the Great Bear route will be $660,000 Cdn., ($564,103 U.S.) over and above the current maintenance costs.

The operating costs associated with the development of the highway services are estimates based on industry standards. It is assumed these costs would be incurred by the private sector.

c. Estimated Visitation and Expenditures

The development of Trail of the Great Bear would result in incremental visitation to the area by drawing on existing visitors, and by attracting new visitors to the area. The incremental visitation numbers derived in Section 2.2 were used as a base to calculate the direct expenditure estimates. The incremental visitation includes visitation from the existing and potential markets, and is based on visitors from outside Montana, since they will bring new revenues into the state. Tables II-19 and II-20 summarize the estimated visitor expenditures, based on these markets, for the Montana portion of Trail of the Great Bear.

Tables II-19 and II-20 show that the additional 1.2 million person days annually drawn to Montana as a result of the Trail of the Great Bear development will generate an estimated $30.7 (Cdn.) or $26.3 (U.S.) million in direct visitor expenditures. Specific information on direct expenditures per capita by market segment is not available for Montana. The estimates shown in Table II-19 are based upon Statistics Canada data (Canadian expenditures in the United States), visitor surveys in Montana and expenditure estimates in Alberta.

d. Income and Employment Impacts

Based upon the Economic Impact Model, the results of which are represented in Appendix I of this report, the total economic impact of developing the Montana portion of the Trail of the Great Bear and its services are estimated at $51.4 million in one-time construction costs and 699 person years in construction related employment which could be displaced over a development period of up to 50 years.

The total annual income impact resulting from the development of the Trail of the Great Bear (Montana portion), is estimated at $68.5 (Cdn.) and $58.5 (U.S.) million for the state and 1,359.5 person years in jobs.

TABLE II-19

ESTIMATED VISITOR EXPENDITURES
TRAIL OF THE GREAT BEAR
MONTANA PORTION (1990 CDN. $)
(LONG TERM, NON-RESIDENT MARKETS)*

Markets		Total Incremental Visitation	X	Length** of Stay	=	Total Person Day Visitation	Direct *** Expenditures Per Capita Cdn. $	Total Direct Expenditures Cdn. $
United States	Day Use:	311,899	X	1	=	311,899	$10.00	$3,118,990
	Overnight:	311,899	X	1.7	=	530,228	$30.00	$15,906,840
	Total					842,127	$22.59	$19,025,830
Canada:	Day Use:	93,100	X	1	=	93,100	$10.00	$931,000
	Overnight:	109,084	X	2	=	218,168	$40.00	$8,726,720
	Total					311,268	$31.03	$9,657,720
Overseas:	Day use:	17,250	X	1	=	17,250	$11.00	$189,750
	Overnight:	18,500	X	2	=	37,000	$50.00	$1,850,000
	Total					54,250	$37.60	$2,039,750
Total	Day Use:	422,249				422,249	$10.04	$4,239,740
	Overnight:	439,483				785,396	$33.72	$26,483,560
	TOTAL	861,732				1,207,645	$25.44	$30,723,300

Source: Travel Montana; Institute for Tourism and Recreation Research - University of Montana

* New revenues generated into the state by non-resident markets.
** Length of stay is an estimate of how long each market will spend along the TGB.
*** Expenditures per capita data by market segment for Montana is limited. Estimates are based upon Statistics Canada data, visitor surveys to Montana as well as visitor expenditure estimates in Alberta.

Note: Numbers may not add due to rounding.

TABLE II-20

ESTIMATED VISITOR EXPENDITURES TRAIL OF THE GREAT BEAR MONTANA PORTION (1990 U.S. $) (LONG TERM, NON-RESIDENT MARKETS)*

Markets	Total Incremental Visitation		X	Length** of Stay	=	Total Person Day Visitation	Direct *** Expenditures Per Capita U.S. $	Total Direct Expenditures U.S. $
United States	Day Use:	311,899	X	1	=	311,899	$ 8.55	$2,666,736
	Overnight:	311,899	X	1.7	=	530,228	$25.64	$13,595,046
	Total					842,127	$19.31	$16,261,782
Canada:	Day Use:	93,100	X	1	=	93,100	$8.55	$796,005
	Overnight:	109,084	X	2	=	218,168	$34.18	$7,456,982
	Total					311,268	$26.51	$8,252,987
Overseas:	Day use:	17,250	X	1	=	17,250	$9.40	$162,150
	Overnight:	18,500	X	2	=	37,000	$42.74	$1,581,380
	Total					54,250	$32.13	$1,743,530
Total	Day Use:	422,249				422,249	$8.58	$3,624,891
	Overnight:	439,483				785,396	$28.81	$22,633,408
	TOTAL	861,732				1,207,645	$21.74	$26,258,299

Source: Travel Montana; Institute for Tourism and Recreation Research - University of Montana

* New revenues generated into the state by non-resident markets.

** Length of stay is an estimate of how long each market will spend along the TGB.

*** Expenditures per capita data by market segment for Montana is limited. Estimates are based upon Statistics Canada data, visitor surveys to Montana as well as visitor expenditure estimates in Alberta.

Note: Numbers may not add due to rounding.

Long Term Benefits

In addition to those benefits which have been estimated in this report, additional benefits will accrue to Montana in time. These benefits could not be estimated accurately at this time, as they relate to the longer term growth of the region as a destination.

As tourism visitation grows in the region, Trail of the Great Bear would increasingly become a focus for tourism activity development. Outdoor recreation activities, guides and outfitters, river touring operations, commercial interpretive tours, and other income and employment generating forms of tourism development could occur.

While these additional tourism services may be long term potential opportunities, it is believed that if Trail of the Great Bear positions itself to be as successful as estimated, these business opportunities would follow in the future.

e. Taxation Impacts

The revenues generated by the development of the Trail of the Great Bear also benefit government through a variety of taxation sources. Tax revenue estimates for Montana are based upon direct expenditures of potential visitors to the Trail of the Great Bear - Montana Portion as well as operating expenditures.

The calculation is based upon applying a 4% tax to the lodging component of the direct visitor expenditures, (lodging component estimated at 18%), applying a 7% state tax on direct visitor and operating expenditures, and applying a 5% indirect business tax to visitor and operating expenditures. This translates into a tax benefit of about $4.3 million Cdn. or $3.7 million U.S. accruing to the Montana government.

2.3.8 Summary

The preceding section included an assessment of the estimated economic impact of Trail of the Great Bear on both the province of Alberta and on the state of Montana. Table II-21 summarizes the key characteristics of each.

The one-time construction impacts for the Montana portion of Trail of the Great Bear will be higher than for Alberta as approximately two-thirds of the route traverses through Montana. As a result, infrastructure requirements and highway upgrading will be greater in Montana.

Total annual impacts of the Trail of the Great Bear will be greater for Alberta because of the higher incremental visitation projected for the province and the increased direct expenditures.

TABLE II-21

SUMMARY OF LONG TERM ECONOMIC IMPACTS RESULTING FROM THE DEVELOPMENT OF TRAIL OF THE GREAT BEAR*

	MONTANA	ALBERTA
Route Length	2,580 km/1,605 miles	770 km/480 miles
One-time Impacts:		
Capital Costs (including highway and services)	$25.7 million (Cdn.) $21.9 million (U.S.)	$16.9 million (Cdn.) $14.4 million (U.S.)
Annual Impacts:		
Operating Costs	$3.5 million (Cdn.) $2.9 million (U.S.)	$2.6 million (Cdn.) $2.2 million (U.S.)
Projected Incremental Visitation (non-resident person visits)	1,207,645	1,666,347
Estimated Direct Expenditures (by non-residents)	$30.7 million (Cdn.) $26.2 million (U.S.)	$51.9 million (Cdn.) $44.4 million (U.S.)
Annual Income Impact on Region	$68.5 million (Cdn.) $58.5 million (U.S.)	$86.5 million (Cdn.) $73.9 million (U.S.)
Annual Employment Impact on Region (person years)	1,359	1,802
Taxation Impact	$4.3 million (Cdn.) $3.7 million (U.S.)	$14.7 million (Cdn.) $12.5 million (U.S.)

Source: Pannell Kerr Forster research

* The impacts shown above are based upon full development and a stabilized year.

2.4 SOCIAL IMPACTS

2.4.1 Introduction

The social impact of tourism can be both positive and negative. Proper planning before commencing tourism expansion can reduce and even eliminate some of the potential negative impacts.

In this section social impacts are presented which comparable corridors have experienced. Areas are outlined for the Trail of the Great Bear where positive and negative social impacts could potentially be experienced.

2.4.2 Comparable Corridors

The social impacts experienced by other tour corridors were influenced by the scope of corridor development and the pre-corridor development level of the area.

Based on research of other corridors, the social impacts which may be experienced in the Trail of the Great Bear corridor area include:

- New businesses open up, offering new services to residents;

- Local people become more aware of the outside world;

- Traditional lifestyles are changed, for example, an area traditionally popular in the summer may begin to experience visitation during other seasons;

- Expectations in terms of lifestyle changes of locals are raised;

- Promotion and access to new areas may encourage an influx of wealthy retirees which could cause some resentment on the part of poorer local residents;

- Longtime residents may not be supportive of the corridor and the resulting impacts from the tourism industry.

2.4.3 Potential Social Impacts

Table II-22 presents potential social impacts and how they might be related to the Trail of the Great Bear.

2.4.4 Planning Guidelines

Increased tourism can have both positive and negative impacts as indicated in Table II-22. Careful planning and continual evaluation will assist in minimizing negative impacts.

The following guidelines to help minimize negative social impacts were outlined by Cooke (1982), based on her work in British Columbia, and are applicable to a project such as Trail of the Great Bear.

- At the local level, tourism planning should be based on overall development goals and priorities identified by communities.

- The promotion of local attractions should be subject to community endorsement.

- The involvement of native people in the tourism industry should proceed only when the band considers that the integrity of their traditions and life styles will be respected.

- Opportunities should be provided to obtain broad-based community participation in tourist events and activities.

- Attempts to mitigate general growth problems identified in a given community should precede the introduction of tourism or any increase in existing levels of tourist activity.

Social impacts are difficult to identify and measure. Different people will react differently to change, and what may be seen as a positive impact to one person may be viewed negatively by another.

It is understood that change will bring about social impact. The key to coping with social impacts, however, is to accent the positive and minimize the negative, and to continually be aware of, and evaluate the impacts. It is imperative to involve participation and encourage direction from the community level, to have local residents "buy in" and support change and development. Mitigation of negative social impact is further aided by the fact that full development of a scenic corridor of this nature is a long and gradual process thereby allowing time for adaptation and management to control possible negative impacts.

TABLE II-22

POTENTIAL SOCIAL IMPACTS RELATED TO THE TRAIL OF THE GREAT BEAR

Impact	Positive Aspects	Negative Aspects
Individual economic independence	Increased employment, wages	Conflict in traditional societies
Labour force displacement	Migration of expertise to tourism region for employment	Greater competition for employment. Forced migration to tourism regions. Stronger growth in specific areas.
Changes in employment	Additional employment in tourism sector	Seasonal facilities may need to operate year round. Seasonal unemployment may occur in other areas. Traditional forms of employment abandoned, growth of resentment, servile attitude on the part of residents.
Changes in land value	Value of land increases	Higher land prices, changes in ownership. Conflict over use.
Improved standard of living	Improved services, facilities, infrastructure.	Tourism generated inflation.
Changes in political-economic system	Decrease of depressed regions. Focus of power may change as areas develop economic strength.	Focus on power may change as areas develop economic strength.
Growth in range of economic activities	Diversification	Exploitation of Trail of the Great Bear and philosophy. Perceived need to satisfy certain demands of increased tourist market. Increase in crime or illicit activities.
Social dualism	Cross-cultural exchange	Conflicts due to the fine line between exploitation and presentation.
Culture as a commercial commodity	Restoration, preservation of cultural heritage. Increased pride.	Disservice to culture as it is commercialized for tourists.

2.5 IMPLEMENTATION STRATEGY

2.5.1 Introduction

To implement the Trail of the Great Bear, numerous aspects must be taken into consideration including management, government and community support, financing, physical planning, transportation and promotion. It is very important to realize at this time that this will not and cannot be a quick process. Some comparable corridors have had development time lines in excess of 50 years. One of the overriding objectives for the implementation strategy is the goal of financial self sufficiency for the Trail of the Great Bear organization. Comparative research has shown that volunteerism is a critical element in the success of a tour corridor. A concept of having stakeholders working towards planning and development can only benefit the entire operation and ensure that they "buy into" the concept.

There will be many groups with interests and concerns in the development of the Trail of the Great Bear. Some of these include:

- public bodies including organizations responsible for tourism, recreation, culture, public land and resources, national properties, economic development, public amenities, and highways;
- private developers and operators, travel industry representatives such as accommodation, food services and transportation services;
- municipalities and residents of the area traversed by the Trail of the Great Bear; and
- tourism organizations and other interest groups.

2.5.2 Strategy Overview

A coordinated strategy is essential for the most effective use of both human and financial resources toward the implementation and operation of the Trail of the Great Bear. It is also necessary to avoid future deficiencies and failure arising from such causes as inconsistency, inaccurate theme structure, unsuitable promotion, development of unsuitable infrastructure, depletion of natural, cultural/historic resources, over use of natural cultural/historic resources and so on. Consequently, it is important that the Trail of the Great Bear be established and governed by a single master organization. The strategies of the development of the Trail of the Great Bear are outlined below:

1. A central leadership must be established for the Trail of the Great Bear organization, and the board of directors should contain at least one high profile volunteer individual.

2. The product or products known as Trail of the Great Bear should be clearly identified.

3. Support for the Trail of the Great Bear should be identified and confirmed from organizations and individuals located at key sections along the Trail.

4. A business plan should be developed, confirmed and agreed to regarding the implementation process, the organization and management, roles of the Trail of the Great Bear organization and its supporting associates, capital and operating budgets and sources of funding.

5. A program of enroling and maintaining community stakeholder involvement should be developed.

6. Available government agency support should be determined and committed.

The above should be put into place prior to the commencement of the physical development of the Trail of the Great Bear.

The purpose and role of a central organization would be:

- provision of a solid foundation for growth and development;

- source of central coordinated implementation, development and organizational plans;

- a unified body for seeking sources of funding and allocating funds;
- a centralized source for setting design and marketing standards, drafting and implementing action plans;
- a central body to evaluate results of action plans and make recommendations;
- a recognized body to address concerns of both the public and private sector;
- a single organization to interface with the tourism and travel industry and national and international marketing networks.

2.5.3 Organization

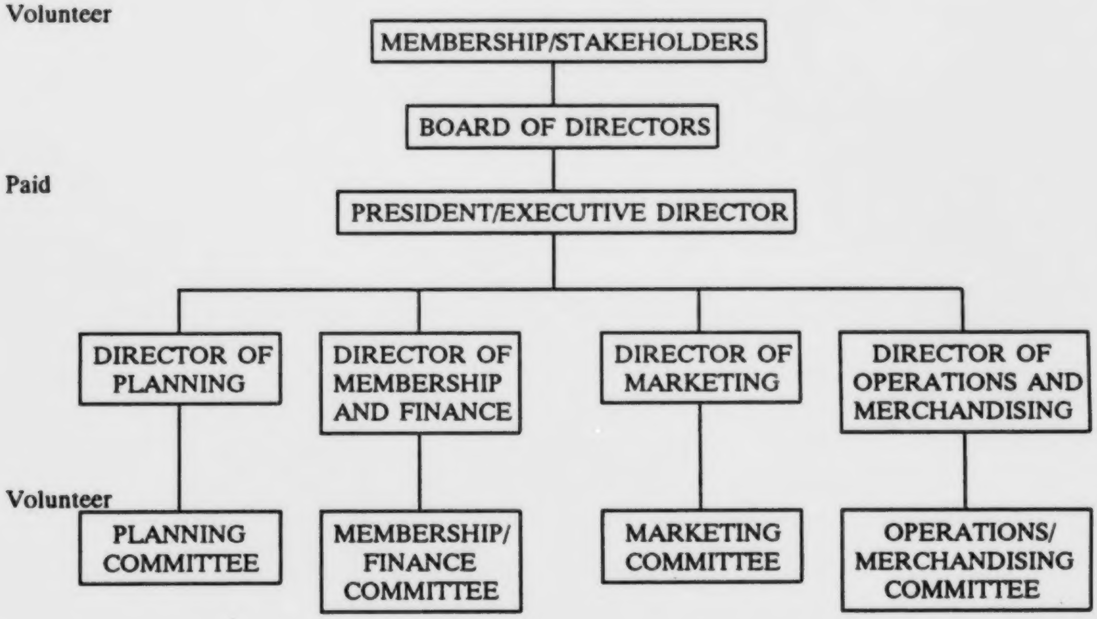
The recommended organization is based on research of the experience of numerous other tour corridor organizations. The majority of comparable tour corridors researched had organizational bodies responsible for development, administration and marketing of their routes. The organizations are comprised of both paid staff and volunteer representatives of areas along the route.

For the purpose of this study the assumption has been made that there would be a central organization having jurisdiction on both sides of the border to implement, administer and operate the Trail of the Great Bear. There is an existing Trail of the Great Bear Society in place which may evolve into this organization.

A suggested administrative structure of the organization is presented in Table II-23.

TABLE II-23

TRAIL OF THE GREAT BEAR MASTER ORGANIZATION ORGANIZATION CHART


Volunteer
MEMBERSHIP/STAKEHOLDERS
BOARD OF DIRECTORS
Paid
PRESIDENT/EXECUTIVE DIRECTOR
DIRECTOR OF PLANNING
DIRECTOR OF MEMBERSHIP AND FINANCE
DIRECTOR OF MARKETING
DIRECTOR OF OPERATIONS AND MERCHANDISING
Volunteer
PLANNING COMMITTEE
MEMBERSHIP/ FINANCE COMMITTEE
MARKETING COMMITTEE
OPERATIONS/ MERCHANDISING COMMITTEE

The organization chart represents five paid positions, supported by volunteer committees. During the initial period only the position of President/Executive Director would be fulltime; the organization would rely heavily on volunteer support. In addition, there would be a part time secretarial position. The director positions are presented as functions. It may very well be that one person may perform dual functions, i.e. Director of Membership and Finance and Director of Marketing, at least during the initial period. The function of planning will be extremely important during the first five years and will require a significant devotion of time. The composition of the Board of Directors could be critical to the success of the Trail of the Great Bear. High profile and influential members will be highly desirable during the early years of implementation, provided they can maintain the integrity of the concept. It would also be desirable to have the members represent a fairly broad spectrum of specialties, i.e. tourism, environment, transportation and economic development.

Duties, Responsibilities and Control

Each position within the organization has specific duties, responsibilities and areas of control. The specifics of each position are detailed in Table II-24.

Committees

Each of the directors would be supported by a committee comprised of volunteers. The volunteers would be members of the organization from both the private and public sector. The purpose of the committees is to provide support to each director in terms of manpower and input. Being members of the organization, they would have a vested interest in the adherence and promotion of the Trail's philosophy and goals.

A preferred method for obtaining committee members would be to ensure there is broad geographic representation throughout the Trail of the Great Bear corridor. In turn, local committees could be established to follow through on the plans determined by the central committee. The benefit of this type of participation is:

- the organization will receive support from a large human resource base;

TABLE II-24

TRAIL OF THE GREAT BEAR MASTER ORGANIZATION OFFICER DUTIES

POSITION	DUTIES/ RESPONSIBILITIES/ CONTROL
President/Executive Director	• Oversee and provide support and direction in the areas of organization, planning, finance, marketing and operations • Approves all budgets • Provide the methodology by which the goals and objectives of the organization are realized while adhering to its philosophy. • The President also serves to unify and tie all interested parties and communities together in joint efforts
Director of Planning	• Develop a five year action plan to be reviewed annually • Develop an annual budget • Collect and maintain an inventory of Trail resources • Provide input into local, regional, provincial/state and federal planning affecting the corridor • Develop and implement tourism plans, build upon existing plans, i.e. Community Tourism Action Plans • Obtain/provide technical assistance on tourism planning • Review and modify, if necessary, implemented tourism plans • Provide recommendations regarding further development or enhancement required of the Trail • Provide technical assistance to those who market products to, or serve, Trail visitors • Identify and determine actions in regards to limiting adverse bylaws or developments to the Trail • Identify and develop implementation development standards • Establish and maintain an ongoing tourism product marketing research program which updates the baseline market strategy and addresses such topics as image, distribution channels, pricing, and competition • Encourage conservation of natural, cultural/historic resources to maintain resource integrity

Table II-24 continued

POSITION	DUTIES/ RESPONSIBILITIES/ CONTROL
Director of Membership and Finance	• Develop an annual budget • Administer the accounting functions of the organization which includes the review and approval of all departmental budgets and the organization budget • Identify and pursue grants and matching funds • Maximize revenues from self-financing ventures, i.e. obtain matching fund grants • Advocate and provide technical assistance on economic development • Establish, implement and administer a membership program
Director of Marketing	• Develop a five year action plan to be reviewed annually • Develop an annual budget • Develop and establish marketing and promotion standards • Develop a volunteer international marketing committee and a promotion committee responsible for international and domestic marketing respectively • Develop and execute an integrated, image-building and cost-effective advertising campaign • Coordinate tourism activities cooperatively with tourism promotion agencies, state and provincial agencies, federal agencies • Review and evaluate marketing activities periodically • Execute consumer/trade displays and consumer awareness campaigns; initiate and sponsor tour packages; develop brochures for distribution • Establish a public relations program to provide ongoing communication with residents, government officials and others with an interest in the Trail • Maintain and make available tourism information and reference material • Develop themed, self-guided tour books for the entire and sub-sections of the Trail, advocate the creation of loop tours • Maintain and distribute a calendar of activities, programs and special events • Establish a marketing information system which gathers and distributes information and forecasts on Trail visitors, markets and competition • Investigate the viability of the creation of a regular image building newsletter

Table II-24 continued

POSITION	DUTIES/ RESPONSIBILITIES/ CONTROL
Director of Operations and Merchandising	• Develop a five year action plan to be reviewed annually • Develop an annual budget • Initiate, complete and maintain the Trail of the Great Bear signing program including Trailblazer markers, interpretive signs, activity signs, visitor service signs • Initiate and maintain infrastructure which falls under the jurisdiction of the organization • Complete and maintain tourism information display boards, kiosks, information centres • Design and implement a tourism monitoring system • Periodically evaluate the quality and seasonality of the Trail experience at various points along the Trail • Provide technical assistance to those who market products to or serve Trail visitors • Maintain relationships with government and other agencies involved in infrastructure development, maintenance and resource capacity • Investigate and develop the merchandising of potential Trail of the Great Bear logo-related products

- all interested parties will be able to participate to their desired level through the committees;

- the committees will serve to tie the entire Trail together with co-ordinated efforts;

- committees provide a means of effectively administering the Trail development plan consistently throughout.

2.5.4 Implementation Plan

It is important to restate that some comparable tour corridors studied for this project have had very long development time lines. The majority utilized existing roadways, with capital expenditures allocated to road improvements, signing, scenic and historic preservation, recreation trails and information centres.

The comparable scenic corridors were established in stages and this appears to be the most effective method. Significant implementation efforts at any one time are hampered by lack of funding and manpower, two items which could also affect immediate, full implementation of the Trail. The summation is that implementation of a tour corridor such as Trail of the Great Bear is a long term, multi-year, on-going process, which will occur in stages.

An action plan outlining the general implementation and development process of the proposed Trail of the Great Bear is presented in Table II-25. It must be noted that while some tasks do have a definite time line others would be ongoing throughout the life of the Trail of the Great Bear scenic corridor. Also due to the different jurisdictions, some aspects may see completion sooner than others.

The financial self-sufficiency of the organization could feasibly be attained through the implementation of its membership program, corporate sponsorship, sale of advertising space for publications and sale of Trail of the Great Bear logo and commercial items.

TABLE II-25
TRAIL OF THE GREAT BEAR
OVERALL IMPLEMENTATION/DEVELOPMENT ACTION STEPS

ACTION STEPS	PERFORMED BY	TIMING (YEARS)
Form master organization, protect Trail of the Great Bear name	Trail of the Great Bear Society	0 - 1
Appoint Board of Directors	Trail of the Great Bear Society	0 - 1
Appoint President/Executive Director	Board of Directors	0 - 1
Ratify philosophy, goals, objectives	Board of Directors and President/Executive Director	0 - 1
Initiate liaison with respective government bodies	Board of Directors	0 - 1
Identify and confirm sources of funding	Board of Directors	0 - 1 and On going
Organize and implement fundraising drive	President/Executive Director	0 - 1 and On going
Appoint Directors	Board of Directors	0 - 1
Establish developmental guidelines for the Trail, develop policies and set technical standards for Trail participants	Officers	0 - 1
Address concerns such as policies/bylaws identified that may impede the implementation of the Trail and identify policies/bylaws which enhance or support the Trail and work with the various agencies involved in their administration	Director of Planning	0 - 1
Establish membership guidelines, levels	Officers	0 - 1
Establish and implement membership sales program	Director of Membership and Finance	0 - 1
Implement membership drive and pursue members	Director of Finance and Membership and Membership/Finance Committee	0 - 1 and On going

Table II-25 continued

ACTION STEPS	PERFORMED BY	TIMING (YEARS)
Develop information package for distribution	Director of Marketing	1 - 3
Determine Trail management sections within the corridor	Officers	1 - 3
Establish committees to support the organization	Officers	1 - 3
Appoint representatives from management sections to committees	Director of Planning	1 - 3
Establish and implement a signing program (trailblazer, interpretive, and attractions)	Director of Operations and Merchandising and Operations/Merchandising Committee	1 - 3
Establish committees to identify loop tours	Director of Planning	1 - 3+
Design a corridor development plan addressing infrastructure needs, road improvements, site interpretation/restoration/development and environmental considerations	Director of Planning and Planning Committee	1 - 3
Initiate creation of commercial Trail publications, souvenirs, specialty items	Director of Operations and Merchandising and Operations/Merchandising Committee, Director of Membership and Finance and Membership/Finance Committee	1 - 3+
Implement corridor development plan	Director of Planning and Planning Committee and Director of Operations and Merchandising and Operations/Merchandising Committee	3 - 5+
Design and implement tourism monitoring system	Director of Operations and Merchandising and Operation/Merchandising Committee	3 - 5 On-going

2.5.5 Operation and Capital Budgets - Initial Year

For the purpose of compiling a projected budget for the first year, operational and capital expenditure budgets of comparable corridors were studied. It must be understood that the budgets presented in Tables II-26 and II-27 are only approximations and allocations would be subject to the availability of funds. In addition, the time lines for capital expenditures may span several years, therefore costs could vary and escalate.

The operating budget presented in Table II-26 gives a range of anticipated fixed and variable administrative expenses for the initial year of operation of the Trail of the Great Bear. It must be recognized that as the product matures the administrative expenses would both increase and decrease in various areas. Again, while there are six paid functions presented, it is conceivable that one person may initially be performing more than one function.

The capital budget presented in Table II-27 relates to the basic and essential needs identified in this report. These may not represent expenditures that will be made in one year but rather over the development of the Trail. The possible exception to this may be the Trailblazer signs outlining the Trail of the Great Bear.

It is also important to recognize that as the Trail becomes financially self-sufficient through private sector sponsorship, membership support and product merchandising, the funds available for expenditure and their allocation may change significantly.

TABLE II-26

OPERATIONAL BUDGET - FIRST FULL YEAR
(CANADIAN FUNDS 1990 $)

Salaries	
President/Executive Director (full time)	$ 35,000 - 38,000
Director of Membership and Finance (part time)	11,000 - 13,000
Director of Planning (part time)	11,000 - 13,000
Director of Marketing (part time)	11,000 - 13,000
Director of Operations and Merchandising (part time)	11,000 - 13,000
Secretary (part time)	8,000 - 10,000
Salaries Expense Total	$ 87,000 -100,000
Other Expenses	
Travel expense	$ 40,000 - 50,000
Office equipment and supplies	8,000 - 10,000
Subscriptions, memberships/dues	2,000 - 4,000
Postage, mailing, distribution	18,000 - 20,000
Telephone and fax	13,000 - 15,000
Rent	4,000 - 6,000
Insurance, legal, accounting	30,000 - 34,000
Promotional supplies for year one, including start-up inventories and expenses	50,000 - 60,000
Implementation of membership program	65,000 - 70,000
Committee expenses	23,000 - 25,000
TOTAL OPERATIONAL BUDGET*	$ 340,000 -394,000

Source: Pannell Kerr Forster research

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* Does not include the cost of maintaining pulloffs, signs and related infrastructure

TABLE II-27

CAPITAL COSTS BUDGET
(CANADIAN FUNDS 1990$)

Pulloffs	$1,303,000
Signing	106,170
Contingency fund (15%)	211,375
Total Capital Costs	$1,620,545

Source: Pannell Kerr Forster research

2.5.6 Potential Sources of Funding

As one of the overriding objectives of the implementation strategy is self sufficiency, the priority for funding sources for the Trail of the Great Bear is concentrated in areas other than those identified by comparable corridors.

In comparable tour corridors the public sector acts as the primary source of funds and the private sector acts as a secondary source of funding. Funds are generated from the private sector primarily through membership dues and the sale of advertising space in corridor published brochures and magazines.

Potential sources of funding for the proposed Trail of the Great Bear have been identified and are presented under either the operational or capital funds category. The agencies identified have programs that may assist or complement the development of scenic highways. The eligibility and availability of potential funds would be subject to the guidelines and intent of the various programs.

Operation Funds - Potential Sources

Bureau of Land Management (U.S.)
Economic Development offices of municipalities and counties along the route
Chamber of Commerce
Corporate sponsorship
Membership sales - annual, life-time, voting, non-voting
  - individual, corporate, association
Advertising sales - brochures, maps, publications
Sales of Trail of the Great Bear commercial items
Team Tourism - Marketing Program (Canada)
Tourism Associations
Alberta Recreation and Parks (Municipal Recreation/Tourism Area Programs)
Alberta Culture and Multiculturalism (Community and Regional Museum Program)
Alberta Career Development and Employment (Wage Subsidy)
The Arco Foundation, located in Los Angeles, California
Carthy Foundation, located in Calgary, Alberta
Devonian Foundation, located in Calgary, Alberta
Matthew Ralph Kane Foundation, located in Brockville, Ontario

Capital Funds - Potential Sources

Capital funds sources are somewhat different from operation fund sources in that their usage may be specified by source and may not necessarily come in the form of cash but in the form of physical assets. While funding has not yet been committed, research indicates the following may have funds available for projects such as the Trail of the Great Bear, subject to program guidelines and intent.

Potential Source	Potential Contribution
Alberta Culture and Multiculturalism (under the authority of the Historical Resources Act)	Place markers, signs, cairns or other interpretive facilities in any suitable location for the interest and guidance of the public
Bureau of Land Management (Montana)	Signing, promotional publications, upgrading and development of recreation areas
The Bureau of Indian Affairs (Montana)	Development/interpretation of cultural/historic sites
Federal Aid Highway Program (Montana)	Funding road improvement
United States Forest Service	Sign funding in common areas
Corporate Sponsorship	Providing funding for scenic pull outs in return for recognition (i.e. plaque stating "This rest stop is provided for your pleasure/enjoyment by XYZ Corporation" or, "This interpretive facility/site is sponsored by XYZ Corporation").
Alberta Recreation and Parks	(Municipal Recreation/Tourism Areas Program)
Dominion Textile Foundation	Located in Montreal, Quebec
Charles H. Ivey Foundation	Located in Willowdale, Ontario
The Richard and Jean Ivey Fund	Located in London, Ontario
Community Tourism Action Program (Alberta)	Funding for site or amenity development/ interpretation or amenity development/upgrading identified in community tourism action plans.
Western Economic Diversification Program (Alberta)	One on one matching for groupings of facilities in the private sector.
Montana Historical Society	Inventory and installation of signs.
Canadian Parks Service	Cost sharing for historical sites.

Potential Source	Potential Contribution
Membership sales	
Sale of Trail of the Great Bear commercial items	

It is important to recognize that while a number of potential sources of funding exist it will require initial effort and time to tap the resources. In the interim, the master organization would require base funding to organize and pursue alternate funding sources.

Research of funding sources for comparable tour corridors revealed that the primary source in the United States is the Federal Government, while in Canada the primary source was the Provincial Government. Additional funding in the United States was provided by the State Government.

Although government funding may not be readily available, researchers were not able to identify any successful corridors existing without government support.

2.5.7 Evaluation/Monitoring System

The measure of success of any project is the comparison of what was intended against what was achieved. Continual evaluation of the various components which serve the implementation and continued development of the Trail of the Great Bear would be necessary to ensure its success.

The following list outlines potential methods of evaluation and monitoring for the various components of the Trail of the Great Bear.

- conduct management audits, organization evaluations;
- review/modify action plan periodically;

- implementation of tourism monitoring system and periodic evaluation of input;

- periodically evaluate the quality and seasonality of the Trail experience at various points;

- review and evaluate marketing activities periodically

  - marketing information system to gather and distribute information and forecasts on Trail visitors, markets and competitors
  - marketing research program which updates the baseline market strategies and addresses image, distribution channels, pricing, competition;

- implement membership monitoring program

  - determine strongest market segment for membership
  - monitor and evaluate membership increases/decreases
  - evaluate membership participation
  - conduct periodic survey of members for input, criticisms, direction;

- liaise with various agencies charged with the duties of monitoring/protecting/ managing natural, cultural and historic resources;

- continually review and revise all annual and five year plans; measure actual achievements against the goals.

2.6 MARKETING STRATEGY

A comprehensive marketing strategy isolates those segments of the entire market that are most likely to utilize the proposed concept, and aims its marketing efforts to meet the needs of those selected groups (i.e. target markets). The four major areas of a marketing strategy, namely product, price, promotion and place, should closely match the needs of the potential visitor.

This marketing strategy identifies a set of actions which must be accomplished in order to meet a set of objectives that should be realistic, achievable and measurable. The action steps have been assigned in order of priority and the participants responsible for carrying out each action have been identified. The monitoring and evaluation procedures have been included to respond to feedback and to suggest modifications and improvements in communicating with potential visitors.

2.6.1 Marketing Goals and Objectives

The general goals and objectives for the Trail of the Great Bear were utilized as a basis to formulate more specific marketing objectives. Because of the nature of this study and the extended time frame for full development of the Trail, it is not feasible to present quantifiable objectives. The marketing objectives should, however, become more specific at a later date. They address three primary and distinct issues:

- resource protection;
- high quality recreation/vacation experience; and
- economic development.

Goal #1

To promote and perpetuate cultural, wildland, and national park values.

Marketing Objectives

- Increase the awareness of the Trail's natural resources.

- Increase the awareness of the Trail of the Great Bear's historical and cultural resources.

- Create name recognition for the Trail linked to these resources.

- Identify and encourage protection of resources which are environmentally fragile and which contribute strongly to the Trail's landscape.

Goal #2

- To develop the Trail of the Great Bear route as an international corridor with a high quality recreation/vacation experience.

Marketing Objectives

- Establish tourism themes for the Trail based on the natural, cultural and historic features of the Trail.

- Increase the recreational and educational opportunities available to potential visitors by season.

- Improve and expand packaging opportunities of the Trail.

- Increase international tourism flow to the area (both North American and overseas).

- Establish well defined interpretive materials and signage to inform visitors of the Trail's product offerings.

Goal #3

To encourage the development of an economically viable tourism product through the Trail of the Great Bear concept.

Marketing Objectives

- To increase spending by current and potential visitors to the Trail of the Great Bear proposed corridor.
- To increase the length of stay of visitors to the region.
- To expand existing visitation along the corridor and the distribution of visitations to attractions and communities within the corridor parameters.
- To attract additional new visitors to the proposed corridor.
- To strengthen the tourism industry in Alberta and Montana by promoting the Trail of the Great Bear concept.
- To increase tourism flow to the area in the shoulder seasons (spring, fall and winter).
- To redistribute visitation in highly travelled tourism areas in the summer to less crowded loop tour destinations.

2.6.2 Marketing Positioning/Strategy

Positioning

While goals and objectives are fundamental to a marketing strategy, the product positioning and key market strategies will determine how well these objectives are achieved. In positioning the Trail of the Great Bear as a scenic touring route, there is a need for a uniform, consistent image that reflects the resources offered en route. The image of the grizzly bear is unique in that it differentiates this scenic corridor from other scenic touring routes in North America.

The southernmost area inhabited by the grizzly bear corresponds with the lands preserved and maintained by the world's first national park, Yellowstone. The Trail of the Great Bear creates the image of the grizzly bear that encompasses a scenic corridor linking the world's first national park, Yellowstone, to the world's first international peace park, Waterton-Glacier, across the international border to Canada's first national park, Banff. This linkage of national parks forms the outer boundaries for the Trail and represent key areas from which to draw tourists along the proposed corridor.

Since the name "Trail of the Great Bear" conjures up the image of viewing bears along the route, this image may represent a constraint for overseas/national visitors in terms of their level of expectation and their actual level of visitor satisfaction derived from the Trail experience. For instance, a German visitor may feel dissatisfied after travelling sections of the Trail, yet never encountering a bear or few interpretive centres/historical sites that describe the characteristics of the grizzly bear. The promotional material must clearly communicate that encountering a grizzly bear on the route is highly unlikely. The image and name recognition for this product will also require testing in the marketplace.

Some distinguishing features of the Trail of the Great Bear that should be emphasized through marketing and product development are as follows:

- The international component of the Trail - this route crosses the international border which allows tourists to experience the geographic, historic and cultural distinctions between Alberta and Montana;
- The number and variety of species along the Trail - this area represents one of the largest wildland regions in North America and has species such as elk, Rocky Mountain bighorn sheep, bison, grizzly bears, birds, waterfowl and so on;
- The variety of unique natural, cultural and historic resources en route from which evolve key marketing themes.

Strategy

Based on the defined marketing goals and objectives, and the market positioning for the Trail of the Great Bear concept, the following broad marketing strategies which should drive the marketing of the corridor region are as follows:

1. To position the Trail of the Great Bear as an "ecotourism model" for a scenic corridor that responds to sensitive environmental issues and sustainable tourism industry development concerns;

2. To market the Trail as an international corridor that connects four world-class national parks, and acts as a gateway to wildlands tourism;

3. To establish a marketing image for the Trail that emphasizes visitor enjoyment of the various resources, and supports educational opportunities to be experienced along the route;

4. To market the Alberta/Montana regions that encompass the Trail as four season destination areas.

2.6.3 Marketing Themes/ Target Markets

Themes are important to create a positive and identifiable image for the proposed corridor. The marketing themes should convey an impression of what the visitor will expect to find in terms of resources and attractions along the route. The overall marketing theme for this proposed corridor is centred around the grizzly bear which is a symbol of the region's wilderness heritage. From this broad based theme evolve a number of the region's marketing themes. Each of the marketing themes presented in Table II-28 correspond to specific product offerings along the Trail that range from a variety of attractions, to recreational activities, to wildland species of both animals and fauna en route.

It should be noted that the seasonal component for each of the marketing themes and their related products is indicated in Table II-28.

The issue of seasonality is critical to the Trail of the Great Bear project given that the national parks that link the major arteries of the Trail are approaching maximum capacity during the summer season. This concept acts as a marketing tool to integrate national park destinations with other existing attractions and communities in the surrounding areas along the corridor routes. The Trail is designed to facilitate the movement of visitors within the corridor to prevent "overcrowding" in the national parks in the peak season, and consequently results in a broader distribution of visitation to the regions. The marketing themes utilized to attract visitors matched with specific target markets and some examples of specific product offerings along the Trail are summarized in Table II-28.

TABLE II-28

MARKETING THEMES/PRODUCTS
TRAIL OF THE GREAT BEAR

	Marketing Themes	Target Markets	Product Examples	Seasonality
1.	National Parks	• National Parks visitors • Special interest groups • Overseas markets (Japan, Germany, U.K.) • Fly and Drive	• Mountains, scenery, wildlife, forests, nature • Banff/Waterton-Glacier/Yellowstone National Parks	Year-around
2.	Native Culture	• Attractions/Special Events • Group touring • Overseas markets • VFR/short getaway • Fly and Drive	• Chief Mountain, Head-Smashed-In Buffalo Jump, Blackfeet and Peigan Reserves, Plains Indian Museum	Year-around
3.	Non-native Culture	• Attractions/Special Events • Group touring • Overseas markets (United Kingdom, Japan) • VFR/short getaway • Fly and Drive	• Montana State Historical Society, Lewis and Clarke Centre, Museum of the Rockies, C. Russell Museum, Frank Slide Interpretive Centre	Seasonal (May 1 - September 1) some year-around
4.	Historic Sites	• Attractions/special events • VFR/short getaway • Group touring • Fly and Drive	• Bozeman Trail, Anaconda, • Grant-Kohrs National Historic Site, Fort Whoop-Up, Fort Macleod, Crowsnest Pass, and several interpretive centres	Seasonal (May 1 - September 1), some year-around

Table II-28 continued

	Marketing Themes	Target Markets	Product Examples	Seasonality
5.*	Soft Adventure Tourism/Recreation	• Fly and Drive • Special interest groups • Pacific Northwest • British Columbia, Alberta, Montana	• Skiing, snowmobiling, canoeing, white-water rafting, horseback riding	Seasonal (i.e. winter - skiing; spring/summer - canoeing)
6.	Wildlife	• Ecotourism groups • National parks visitors • Overseas markets (Germany) • Fly and Drive	• Trout streams, large mammals • Habitats • Birds	Seasonal (Spring/Fall especially good viewing times)
7.	Nature Appreciation	• National parks visitors • Overseas markets (Germany) • Ecotourism groups • Fly and Drive	• Flora, Fauna, rock formations (i.e. Columbia Rockies) foothills, land forms	Seasonal (Spring/Fall)

* Soft adventure refers to experiencing outdoor activities such as skiing, canoeing, hiking and horseback riding with the comforts of modern day amenities (i.e. luxury in the midst of the wilderness).

The marketing themes in Table II-28 correspond to the overall themes of the Trail of the Great Bear. The product examples that have been identified along the Trail to match these themes describe some of the unique features and resources of the proposed corridor.

While some of the products are only available on a seasonal basis, this presents the opportunity for Trail of the Great Bear to market key products in the shoulder and/or off-season. The marketing strategy for the Trail as a four season destination, for example, would be to emphasize the potential of shoulder season marketing (spring/fall) as most areas have the capacity for increased visitations in these seasons. The product availability, however, must be assured before marketing efforts can continue. A more detailed plan for this marketing strategy will be outlined in the marketing action plan.

Each of the marketing themes depict unique characteristics that would appeal to specific markets along the route. The themes can be promoted individually to appeal to a particular market segment, or they can be grouped together to appeal to a diversity of visitor interests. While target markets have been identified that would be most suited to the specific marketing themes, it should be up to the individual communities and supporting committees in the various regions along the Trail to promote the marketing themes that best match their product attributes. For example, the Crowsnest Pass area, with its diverse range of historical sites including Collieries, the Frank Slide Interpretive Centre and various museums, would be likely to promote the historic and non-native culture themes. The target markets that would match these thematic characteristics are as follows:

- attractions/special events;
- group touring;
- overseas (United Kingdom, Japan); and
- V.F.R./short getaway markets.

2.6.4 Marketing Action Plan

Marketing Strategy #1

To position the Trail as an "ecotourism model" for a scenic corridor, that responds to sensitive environmental issues and sustainable tourism industry development concerns.

Marketing Objectives

- To increase awareness of the Trail's historical, cultural and natural resources.
- To identify and encourage protection of resources which are environmentally fragile and which contribute strongly to the Trail's landscape.

Target Markets

- National Parks visitors.
- Special interest groups (i.e., ecotourists).
- Private automobile/fly and drive markets from national/overseas origins.

Action Plan	Time-Line (Years)	Participants
Product		
1. To encourage the development of an interpretive systems plan that identifies key themes, messages, product components and environmentally sensitive areas/resources for the corridor area.	0 - 1	• Community tourism organizations • Cultural and environmental awareness groups • Environmental/historical experts
2. Liaise with agencies to determine the level of use of sensitive resources and to market resource-based products.	1 - 3	• National parks • Community awareness groups • Federal/State/Provincial agencies

Action Plan	Time-Line (Years)	Participants
3. Encourage the development of "ecotourism" product lines.	5+	• Special interest groups • Outdoor clubs, associations • Private sector
4. Encourage tourism operators to recognize environmental sensitivities in developing and managing tourism operations.	1 - 3+	• Tourism operators • Environmental experts • State/Provincial Agencies
Promotion		
1. Initiate promotional campaigns that increase awareness of current "green issues" and link Trail of the Great Bear to ecotourism.	0 - 1	• University campuses • Environmental groups • Tourism organizations
2. Create print media brochures which interpret and promote the natural/cultural resources along the Trail.	1 - 3	• Tour operators/wholesalers • Community businesses • Tourism organizations
3. Create a general scenic guidebook followed by themed guidebooks (i.e., adventure tourism, historic, natural, cultural themes) • sell advertising space within to cover printing costs	3 - 5+	• Community businesses • Interpretive/naturalist clubs in Canada/U.S. • Tourism organizations
4. Generate articles for naturalist magazines by offering complementary tours of segments of the Trail.	1 - 3	• Travel writers (i.e., National Geographic; Fishing and Hunting; Outdoor Adventure)
5. Send direct mail inserts to interpreters, naturalists and other interested groups.	1 - 3	• Special interest clubs, organizations

Action Plan	Time-Line (Years)	Participants
Distribution		
1. Ensure that appropriate signage is in place to inform visitors of protected areas.	0 - 1	• Trail of the Great Bear master organization.
2. Send promotional material to: • existing visitor information centres • National Parks • Accommodation/food establishments • Clubs A.M.A.; A.A.A.; R.V.; naturalists	1 - 3	• Special interest clubs/ associations • Auto touring clubs • Hotels/restaurants
Monitoring and Evaluation		
1. Encourage the development of a marketing information system which monitors scenic corridor visitors, markets and competitors.	3 - 5+	• Marketing Committee
2. Evaluate marketing activities for Trail of the Great Bear (i.e. send market surveys).	3 - 5+	• Marketing Committee.
3. Utilize the information collected to establish a benchmark data base.	3 - 5+	• Marketing Committee • Trail of the Great Bear master organization

Marketing Strategy #2

To market the Trail as an international corridor that connects four world-class national parks, and acts as a gateway to wildlands tourism.

Marketing Objectives

- Establish tourism themes based on existing features.
- Increase recreational opportunities for visitors.
- Establish well defined interpretive materials and signage to inform visitors of the Trail.
- Increase international tourism to the corridor area.

Target Markets

- Overseas visitors (i.e., fly-drive, R.V. rental markets to Alberta/Montana with emphasis on Germany and the United Kingdom).

- Private automobile/R.V. travellers to Alberta/Montana from other provinces/states.

- National park visitors to Banff/Waterton/Glacier/Yellowstone.

- Special interest groups with focus on wildlands/ecotourism.

Action Plan	Time-Line (Years)	Participants
Product		
1. Initiate hospitality training for employees along the route to enhance the quality of service and increase visitor satisfaction.	0 - 5+	• Tourism organizations • Small businesses in tourism
2. Coordinate an international marketing committee and a promotion committee responsible for international and domestic marketing respectively.	0 - 1	• Director of Marketing - Trail of the Great Bear master organization; local community support
3. Develop clear, directional signage and routing maps for visitors to view the entire route and various potential loop tours.	0 - 1	• Trail of the Great Bear master organization
4. Increase the type and number of recreational products along the route as demand warrants.	0 - 5+	• Private sector
Promotion		
1. Business operators should group together similar "themes" to sell the Trail of the Great Bear concept.	0 - 1	• Small businesses • Corporate sponsorships
2. Coordinate joint promotions with Federal/State/Provincial organizations to target international markets.	3 - 5+	• Federal/State/Provincial Tourism Departments • Trail of the Great Bear international marketing committee
3. Attend international/national trade shows to increase awareness of this new tourism product.	1 - 3	• Federal/State/Provincial Tourism Departments • International marketing committee

Action Plan	Time-Line (Years)	Participants
4. Develop a travel brochure focusing on the Trail's facilities and products.	1 - 3	• Marketing committee
5. Install a toll-free 1-800 number for visitors to make inquiries; should be accessible in both Canada and the United States.	0 - 1	• Visitor centres; Federal/ Provincial/State tourism agencies
Distribution		
1. Send promotional material to: • tour operators/tour wholesalers • travel agencies • international consulates - tourism officer • visitor information centres • national parks in corridor area • auto touring clubs (A.A.A., A.M.A.).	1 - 3	• International marketing committee • Marketing committee
Monitoring and Evaluation		
1. Record the number and origin of requests on a monthly basis from the toll free number for Trail of the Great Bear.	1 - 3	• Visitor Information Centres
2. Monitor the number of international hotel/motel bookings to operators within the corridor area.	3 - 5+	• Hotel operators • Marketing Committee
3. Initiate visitor surveys to address key issues such as: origin, purpose of visit, level of satisfaction and willingness to return to the corridor.	3 - 5+	• Visitor Information Centres • Small businesses • Federal/State/Provincial tourism agencies • Marketing Committee

Marketing Strategy #3

To establish a marketing image for the Trail that emphasizes visitor enjoyment of the various resources, and supports educational opportunities along the route.

Marketing Objectives

- Increase recreational/educational opportunities for visitors.
- Establish well defined interpretive materials/centres to inform and educate visitors.
- Increase awareness of the Trail as a vacation destination opportunity.

Target Markets

- Mountain and Pacific Coast States, British Columbia and Saskatchewan residents - especially families with children.

- Overseas markets, focusing on Germany, Japan, and the United Kingdom.

- Group touring and V.F.R. markets.

- Private vehicle touring market.

Action Plan	Time-Line (Years)	Participants
Product		
1. Identify guiding/recreational suppliers in the corridor area to widen product availability; approach those who are already operating to provide services for visitors (i.e., horseback holidays, heli-hiking, river rafting, kayaking).	1 - 3	• Tourism suppliers/commercial businesses
2. Encourage the development of theme tours that can be offered through package tours by operators (i.e., native culture, historic sites and wildlife/ photography tours).	3 - 5+	• Tour operators • Tour wholesalers
3. Create and secure a trademark for the concept as a revenue generator.	0 - 1	• Trail of the Great Bear master organization
Promotion		
1. Identify/approach existing interpretive centres to encourage participation in co-op advertising and packaging.	1 - 3	• Interpretive centres on the route
2. Initiate joint Montana/Alberta direct mail campaigns to the tourism regions along the route to provide information on the Trail.	0 - 1	• Regional tourism organizations • Marketing Committee
3. Develop a media program to inform visitors of recreation/vacation opportunities and resources en route (i.e., video programs, calendar of events brochure, press releases).	3 - 5+	• Visitor Information Centres • Marketing Committee

Action Plan	Time-Line (Years)	Participants
4. Encourage travel writers/travel buyers to visit the Trail by offering complementary tours of the corridor area (i.e. familiarization tours).	1 - 3	• American Society of Travel Writers • Canadian Society of Travel Writers • Tour wholesalers
5. Attend trade shows/consumer shows both domestically and overseas to promote the Trail to both travel operators and potential visitors.	1 - 3	• Travel trade operators • Potential visitors • Marketing Committee
6. Design a Trail of the Great Bear travel magazine to highlight the attractions, facilities and resources along the route.	5+	• Members of Trail of the Great Bear master organization.
Distribution		
1. Distribute promotional material as indicated in the action plan for strategy #3 (i.e., mail campaigns to tourism regions; travel magazines to members and other interested parties).	1 - 5+	• Tourism organizations • Potential members of Trail of the Great Bear Society • Special interest/ motoring clubs
Monitoring and Evaluation		
1. Attach self-addressed envelopes in promotional material/Trail of the Great Bear magazine to monitor effectiveness.	5+	• Marketing Committee
2. Distribute consumer surveys to evaluate media programs, informational packages.	5+	• Visitor Information Centres • Federal/State/Provincial agencies • Community businesses • Marketing Committee

Marketing Strategy #4

To market the Alberta/Montana regions that encompass the Trail as four season destination areas.

Marketing Objectives

- To increase spending by current and potential visitors to the corridor area.
- To increase tourism flow to the corridor area in the shoulder seasons (spring, fall, winter).
- To increase the length of stay of visitors to the region.
- To expand existing visitation along the corridor.
- To redistribute visitation in highly travelled tourism areas in the summer to less crowded loop tour destinations.

Target Markets

- Seniors market from urban geographic areas, especially recreational vehicle owners.
- Short getaway market for extended weekend vacations.
- Overseas markets, focusing on the fly and drive and tour group travellers from Germany, Japan and the United Kingdom.
- North American markets - fly and drive and tour group travellers.

Action Plan	Time-Line (Years)	Participants
Product		
1. Identify and encourage development of special events and activities during the winter and spring seasons to increase visitations year round (i.e., emphasis on skiing in the winter; cultural events in the spring).	1 - 3	• Regional tourism organizations • Local businesses in tourism/recreation • Special interest groups • Community groups
2. Encourage development of four season facilities (i.e., extend existing summer season for lodging, restaurants to accommodate off-season visitors) as demand warrants.	1 - 3	• Regional business operators, tourism associations
Promotion		
1. Develop joint marketing ventures for operators of businesses along the Trail.	1 - 3	• Community businesses, Chambers of Commerce, local/regional tourism organizations
2. Create informational packages for the motoring public on scenic roads that describe features such as potential loop tour destinations on route.	3 - 5	• Visitor Information Centres • Marketing committee
3. Develop product based promotional campaigns to promote key activities available in the shoulder seasons such as: • stopping at visitor centres/interpretive historical sites • wildlife/nature viewing/photography (emphasize reduced costs/no overcrowding).	0 - 1	• Marketing committee • Private tourism operators • Tour operators • National parks

Action Plan	Time-Line (Years)	Participants
4. Include Trail of the Great Bear route on official road maps for both Montana and Alberta.	0 - 1	• Provincial/State Agencies
5. Attend consumer shows that involve exhibiting the Trail of the Great Bear concept for target markets	0 - 1	• Marketing committee
Distribution		
1. Distribute promotional material as indicated in the action plan for strategy #4.	1 - 5+	• Auto touring clubs • Tour operators • Private tourism operators • National parks
Monitoring and Evaluation		
1. Record hotel bookings on a seasonal basis to evaluate influence of promotions on shoulder season travel.	5+	• Hotel operators • Marketing committee
2. Collect visitation statistics at major gateways to the Trail on a seasonal basis.	5+	• Visitor Information Centres • Federal/State/Provincial agencies

2.6.5 Organization/Implementation of Marketing Action Plan

Significant research efforts were invested with tourism operators, travel and tourism associations, affiliated clubs and government organizations to determine the most appropriate marketing strategies for the Trail of the Great Bear.

Although the marketing responsibility for this plan would be taken on by the governing body, the Trail of the Great Bear master organization, this organization would appoint a marketing committee responsible to coordinate and implement the marketing strategies.

2.6.6 Marketing Budget/Sources of Funding

In order to achieve the objectives of the marketing action plan, the Trail of the Great Bear master organization will eventually require a marketing budget in the range of $240,000 to $300,000 (see Table II-29) for a stabilized year. This amount was derived from comparable scenic Trail marketing budgets taking into consideration the total annual marketing budget with respect to the distance of the Trail. The marketing of this corridor will likely begin before all of the attractions and facilities are fully developed. Caution must be exercised, however, to promote the Trail only to the level of existing product development. As the traffic in the corridor increases, the willingness to invest in the development of the Trail and towards the marketing strategy will most likely increase.

Table II-29 outlines an approximate marketing budget for the promotions identified in the action plan. It should be noted that the percentages allocated to the promotional categories are based on an analysis of marketing budgets for regional marketing plans. The average expenditure percentages for each of the promotional categories were utilized to calculate the budgeted amount for the Trail of the Great Bear.

TABLE II-29

ANNUAL MARKETING BUDGET
TRAIL OF THE GREAT BEAR
STABILIZED YEAR *

Promotional Category	Percentage	Amount
Advertising	23-25%	$60,000-$70,000
Publications/Guidebook	30-33%	$80,000-$90,000
Trade Shows/Consumer Shows	12-13%	$30,000-$40,000
Public Relations	12-13%	$30,000-$40,000
Promotional Material	12-13%	$30,000-$40,000
Market Research/Evaluation	4 - 6%	$10,000-$20,000
		$240,000-$300,000

Source: Pannell Kerr Forster research

* A stabilized year occurs when the Trail is fully developed.

Note: The marketing budget will increase by inflation annually, and may involve additional costs to allow for expansion of advertising, promotion and other marketing activities.

In terms of potential funding possibilities, the availability and amount of funding for the marketing plan can only be identified in broad terms due to the scope of this project. In Table II-30, some private, public, and non-profit sources of funding have been identified for this project. For this project to be successful, the Trail of the Great Bear master organization will require support and initiative from major partners and local communities as well as financial commitment through full regional representation and dedication to the Trail of the Great Bear project.

TABLE II-30

FUNDING SOURCES

Source	Type of Fund	Nature of Fund	Comments
Team Tourism Marketing Program (Marketing)	Provincial	For marketing activities identified in Tourism Zone Marketing Plans • Each zone allocated a specific amount. • Designed to coordinate regional marketing activities	• Will match funds on a 50% grant basis until March 1993. • Applies to individual operators, non-profit groups and municipalities. • Cooperative regional marketing campaigns subsidized.
Community Tourism Action Program (Capital Development for signage only)	Provincial	• Projects must be identified in community tourism action plans. • Funding on a cost-share basis; max. 75% government/min. 25% applicant. • Program expires July 31, 1993.	• Assistance to private sector operators and non-profit groups. • Useful for Trail of the Great Bear directional/ promotional signage; projects that support Trail of the Great Bear.
Travel Montana	State	• May participate in joint marketing efforts to promote the Trail of the Great Bear.	• Assistance for Trail of the Great Bear project may be incorporated into overall marketing plan; trade show promotions.
Calgary Convention and Visitors Bureau	Regional	• Marketing zone funds pertaining to cultural marketing may include this touring route.	• Funding provided for lure brochures, highway signage, and trade show displays.
Chinook Country Tourist Association	Regional	• Marketing zone funds to target "touring" products such as the Trail of the Great Bear concept. • Linkage between the touring product and the zone is a priority.	• Promotions should reflect the heritage, cultural and natural activities and attractions on the route.

Table II-30 continued

Source	Type of Fund	Nature of Fund	Comments
Banff/Lake Louise Chamber of Commerce	Regional	• To enhance and promote Banff/Lake Louise as a tourism destination area. • Marketing budget encourages increase in visitation/length of stay in Banff National Park.	• Lure program may provide funding for Trail of the Great Bear.
Waterton Chamber of Commerce and Visitor's Association	Regional	• Marketing budget encourages increase in visitation/length of stay in Waterton Lakes National Park.	• Congruent with Trail of the Great Bear philosophy to move traffic along the Trail and through the national parks.
Kananaskis Country Tourist Association	Regional	• May participate in joint marketing efforts in support of Trail of the Great Bear.	• Emphasis on local, regional tourism markets.
Montana Tourism Organizations	Regional	• May participate in joint marketing efforts in support of Trail of the Great Bear.	• Limited marketing/ promotional budgets.
Individual Community Associations	Local non-profit	• Fund raising through membership sales for the Trail.	• Seek community involvement for promotions
Corporate Sponsorships	Private Sector	• Joint promotional effort to encourage sales of private sector products along the route.	• Seek corporate sponsors such as oil companies with service stations en route (i.e., Petro Canada, Exxon, Shell).
Service Sector Operators	Private Sector	• Cooperative promotional possibilities for their facilities/ accommodations on the route.	• Seek cooperative "partners in promotion" funding with government federal/state/provincial tourism agencies.

SECTION THREE: SUPPORT INFORMATION

3.1 ASSESSMENT OF SCENIC TOUR CORRIDORS FROM OTHER JURISDICTIONS

3.1.1 Introduction

To assist in the overall planning, implementation and marketing of the proposed Trail of the Great Bear, comparative research was conducted with other scenic tour corridors currently in existence. Five scenic tour corridors were researched and analyzed, four situated in North America and one overseas. These included: Great River Road, New York Seaway Trail, Blue Ridge Parkway, Cabot Trail and the Romantic Road.

Table III-1 reveals common elements and trends characteristic to these five tour corridors. These trends are summarized briefly below.

1. Scenic Road Features

A common characteristic of scenic roads is that they contain a mix of cultural, historic, visual and recreational resources. Routes may have a stronger mix of some resources than others (i.e., recreation vs. historic). However, the key is that tour corridors must have unique features to entice people to tour the route.

Support features such as accommodation facilities, restaurants, rest stops and information centres are critical components of a scenic tour corridor. In addition, signs are required for direction and interpretation purposes and are critical to the overall success of a tour corridor.

2. Route Function

Scenic touring corridors sometimes play a dual function, depending upon their location. Touring corridors can function as both a touring and a community access route. It is important that the route function be understood prior to development so that appropriate services and facilities can be developed.

3. Route Design

All of the tour routes examined have developed loop tours and side trips as additional features to the main corridor. These loop tours offer the advantage of accessing sites of interest which could not be easily reached from the main route.

4. Legislation

Research revealed that an increasing number of states and provinces are participating in identifying and developing scenic routes. In Canada, the designation is primarily the responsibility of the provincial governments. In the United States, the Federal government is more readily involved with scenic byways and their designation. In 1991, a new Federal Highway Bill will be proposed in the United States. The bill will allow for the creation of a new scenic byways program to assist in the development of scenic corridors.

5. Organization

All of the tour corridors examined have some form of organization responsible for the overall administration and operation of the route. The organizations are mostly comprised of volunteer representatives from both the public and private sector. These organizations work closely with the respective federal/state and provincial government bodies in administering and operating the route.

6. Administration

The two main governing bodies involved in the administration and operation of the researched tour routes are the National or Canadian Parks Service and the Federal and Provincial/State Department of Highways.

7. Financing

Capital and operating funding for scenic tour corridors can come from a number of sources. Some of these sources may include:

- federal governments
- state/provincial/local governments
- private sector

The private sector should not be overlooked as a funding source. Through the formation of associations, the private sector can raise funds for marketing activities and promotion of the route as well as for other special projects.

8. Marketing

Marketing of scenic touring routes is critical to their overall success. Marketing activities in most cases, are conducted by the associations or commissions representing the individual tour corridors. The key to a successful marketing program is shared initiatives among all partners involved. It is essential that a master committee be formed to coordinate marketing activities and to work cooperatively with individual areas or regions developing and implementing marketing programs.

9. Visitation

People who use tour corridors are typically, mid-income level families, seniors or outdoor adventurers. Automobile and recreational vehicles are the primary mode of transport for visitors using tour corridors. Scenic tour corridors appeal both to local markets as well as to international markets.

Summer and fall tend to be the most popular seasons for scenic touring.

Some of the primary activities for tour corridor participants include stopping at overlooks, visiting natural sites and stopping at visitor centres. A review of visitation trends along the corridors examined indicates that scenic touring is increasing in popularity. Visitation increases and positive economic impacts along the corridors can be attributed to the actual development of the route.

10. Impacts and Constraints

As with other developments, tour corridors/scenic highways have positive and negative economic, social and environment impacts attached to them. Some of these include:

Positive Impacts	Negative Impacts
• Economic benefits such as job creation, tax revenues, salary, wage benefits	• Excessive construction can be harmful to the environment
• Greater awareness of conservation and the environment	• Destruction of traditional values of the local people
• Stimulation of interest in history and culture of an area	

TABLE III-1

SCENIC TOUR CORRIDOR: SUMMARY TABLE

Name/ Location	Scenic Corridor Features	Development Costs	Visitation/Impacts	Target Markets	Administration
The Great River Road					
• Flows along the Mississippi River • Ontario, Manitoba, and 10 states	• Multi-jurisdictional • 3,000 miles in length • Utilizes existing roads • Dual routes/side tours developed • Numerous cultural/scenic/ and historic sites • Standard signage & logo throughout route	• Total development costs = $635M (U.S. $) (1973-1985) • Federal government = $250M (39%) (U.S.$) • State government = $384M (U.S.)	• Increasing since development • Prime visitation is summer/ fall	• Families/seniors • Cars/RV's/Bus • River states, Central U.S., Central Canada, Japan/ Germany	• U.S. Federal Highway Administration • Individual State Department of Highways • Mississippi River Parkway Commission
The New York Seaway Trail					
• Parallel's Lake Erie, Niagara River, Lake Ontario, St. Lawrence River • Travels through the State of New York (10 counties)	• 454 miles long • Utilizes existing routes • Promotes a "mixed-use right of way" with numerous recreational/ historic/scenic resources • 300 historic sites • Information kiosks • Standard signage (42 theme signs)	• Capital and operational costs from 1986 - 1988 = $1.05M (U.S. $) (State appropriation)	• Increasing • Tourism employment in 1986 increased by 36% over 1976 • Prime visitation is summer/fall	• Touring families • Outdoor/campers • Seniors • Primary market originates from 10 counties of New York State and Ontario	• New York Seaway Trail Inc. • New York State Department of Transportation

M = Millions
K = Thousands
N.A. = Not Available

TABLE III-1
SCENIC TOUR CORRIDORS: SUMMARY TABLE (continued)

Name/ Location	Scenic Corridor Features	Development Costs	Visitation/Impacts	Target Markets	Administration
The Blue Ridge Parkway					
• Links Great Smokey Mountain National Park in North Carolina to Shenandoah in Virginia • Crosses two states	• 470 miles long • Entire parkway is a National Park • Built from scratch in 1935 • Completed in 1985 • Every mile is landscaped • Major emphasis is on scenic vistas • Live interpretive sites • Standard signage/ interpretation	• Total cost of parkway = $140M (U.S. $) • Provided by Federal government	• Increasing from 18M annually in 1983 to 26M in 1988 • Prime visitation is summer/fall	• Visitors come from within a 200 mile radius • Families • Outdoor types • Seniors • Most travel by car (motorcoach not yet promoted)	• National Parks Service • Blue Ridge Parkway Commission
The Cabot Trail					
• Circles northern tip of Nova Scotia, passing through Cape Breton Highland Park	• 185 miles long • 100 miles lies within a National Park • Road built from scratch in 1935 • Numerous scenic/cultural/ historic sites • Trail is fairly isolated • Signing in park and outside differs • Under 2 different jurisdictions	• Total costs N/A • Capital budget = $3.2M/yr. (Cdn. $) • Operational budget = $385K/yr. (Park area only)	• 1988 - 569,813 park visits • No other figures available for entire trail • May - October is prime period	• Touring families • Origin of visitors is U.S., Central Canada and Nova Scotia	• Canadian Parks Service • Provincial Department of Highways

M = Millions
K = Thousands
N/A = Not Available

TABLE III-1
SCENIC TOUR CORRIDORS: SUMMARY TABLE (continued)

Name/ Location	Scenic Corridor Features	Development Costs	Visitation/Impacts	Target Markets	Administration
The Romantic Road					
• Located in Germany	• Runs 218 miles • Germany's oldest and most celebrated tourist route • Winds through a rich heritage of history, art, and culture • An alternative route to the main arteries of the north, south and middle motorways • Numerous historic sites and festivals • Route was founded in 1950 • Uses existing roads	• Total costs N/A • Promotional budget = $90K/yr. (Cdn.$)	• N/A	• Motorcoach tours • Touring families	• Road is maintained by the Republic • Association made up of paid members (stakeholders along the route)

M = Million
K = Thousands
N.A. = Not available

Source: Pannell Kerr Forster research

3.1.2 Implications for Trail of the Great Bear

Research and analysis of other jurisdictions have identified several implications towards the planning and development of Trail of the Great Bear. Some of these implications are listed below.

- Consistency in signage, interpretation, marketing and administration should be provided;
- The utilization of existing highway systems would minimize construction and upgrading costs;
- Complementary tourism services as well as a mix of cultural, historic and recreational attractions should be developed;
- Volunteerism will be critical to the success of the Trail of the Great Bear;
- Regional planning committees or sub-associations should be established for the administration of Trail of the Great Bear;
- A variety of private and public sector organizations should be approached for funding requirements;
- The success of Trail of the Great Bear lies to a large extent in a marketing plan that effectively promotes to the target markets identified;
- The Trail of the Great Bear will appeal to both regional and overseas markets;
- To reduce the environmental/cultural/social impacts, local communities should be involved in establishing planning guidelines and policies.
- Full development of the Trail of the Great Bear will evolve over a long time period.

3.2 RESOURCES INVENTORY AND ASSESSMENT

3.2.1 Introduction

One of the major objectives of the Trail of the Great Bear Feasibility Study was to inventory the corridor area and to evaluate opportunities for, and constraints to, development of a touring route as well as associated loops, secondary and seasonal routes. The following section highlights the results of this research and assessment.

Inventory Process

An inventory of the study area was undertaken individually by the consultants addressing distinct major resource areas and sites.

In addition, the consulting team contacted numerous government officials, politicians, business people, special interest groups and citizens to obtain a base of information for the inventory and to identify opportunities and constraints. A consultants workshop was held to discuss significant natural, cultural/historical and tourism resources and identify major constraints and opportunities.

It was determined that the most reasonable way of presenting the inventory and analysis was by segments of highway. The study area was divided into 35 "route segments" stretching between Banff and Yellowstone National Parks. These route segments are described on Table III-2 and are visually presented on Map 4.

The consultants eliminated 16 route segments (Other Route Segments) from detailed review due to limited significant natural or cultural/historic resources and/or because adjacent segments were overwhelmingly rich in resources.

Each route segment was inventoried and assessed relative to:

- Natural Resources (wildlands, wildlife and landscape)
- Cultural and Historic Resources

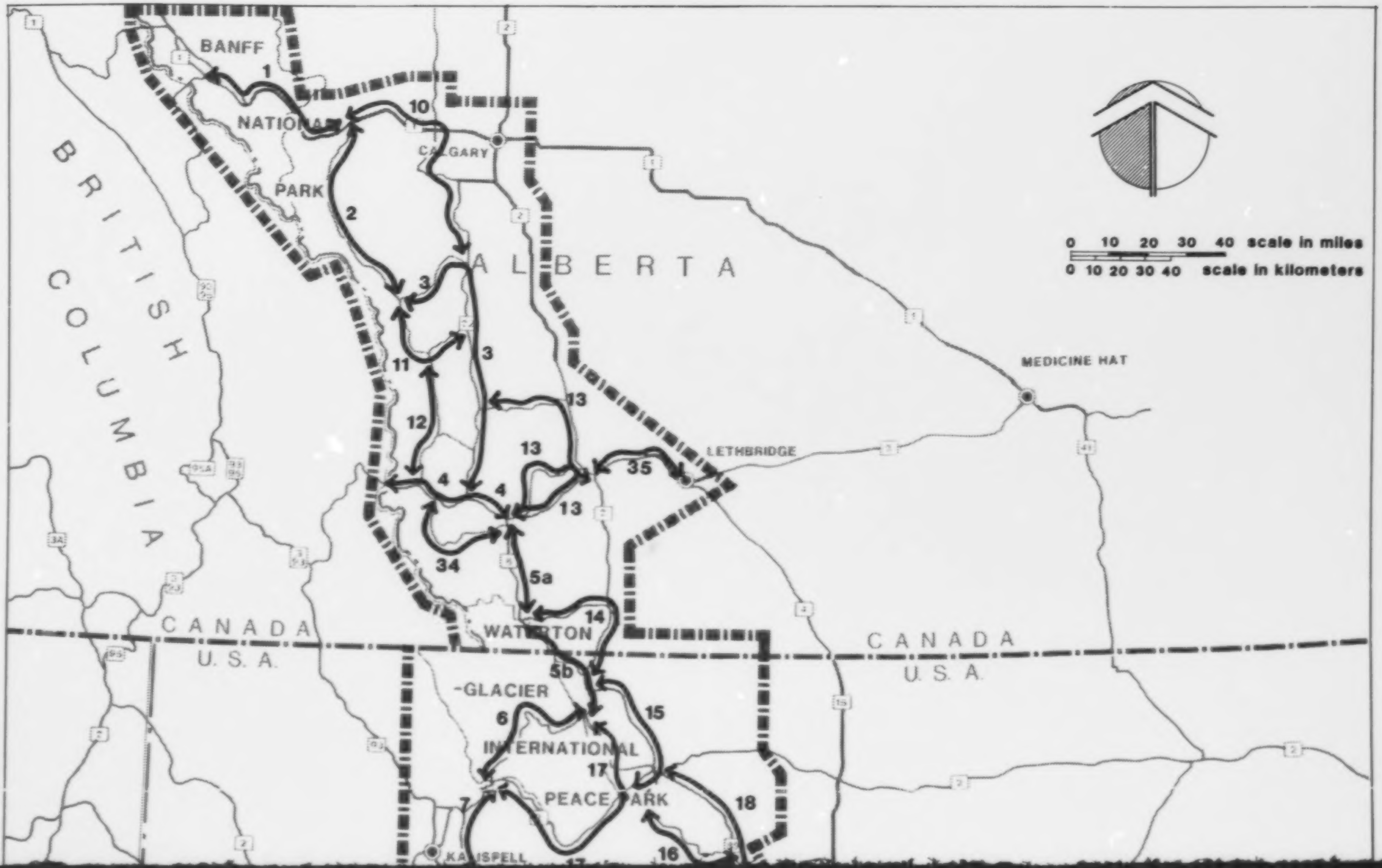
- Tourism Resources (accommodations, food and beverage, visitor services, recreational facilities and services, retail facilities, commercial attractions/special events and infrastructure)

Only those resources that are most significant, or potentially significant from a tourism perspective were included.

TABLE III-2

ROUTE SEGMENTS

Segment 1:	Banff - Highway 40
Segment 2:	Highway 40 - Highwood Junction
Segment 3:	Highwood Junction - Highway 22 - Highway 3
Segment 4:	Crowsnest Pass - Pincher Creek
Segment 5A:	Pincher Creek - Waterton
Segment 5B:	Waterton - St. Mary
Segment 6:	Glacier National Park and Going-to-the-Sun Road
Segment 7:	West Glacier - Missoula
Segment 8A:	Missoula - Drummond - Highways 200 and 141
Segment 8B:	Drummond - Butte
Segment 9:	Butte - West Yellowstone
Segment 10:	Highway 1 and 22, Highway 40 Junction - Longview
Segment 11:	Highwood Junction - Highway 940 - Plateau Mountain
Segment 12:	Highwood Junction - Coleman
Segment 13:	Head-Smashed-In Loop
Segment 14:	Waterton - Cardston - Chief Mountain Loop
Segment 15:	Duck Lake - East Glacier
Segment 16:	Heart Butte Loop
Segment 17:	St. Mary - East Glacier - West Glacier
Segment 18:	Browning - Wolf Creek
Segment 19:	Choteau - Great Falls - Wolf Creek
Segment 20A:	Wolf Creek - Helena
Segment 20B:	Helena - Whitehall
Segment 21:	Helena - Avon
Segment 22:	Swan River Valley
Segment 23:	East Side Flathead Lake
Segment 24:	Highway 212, National Bison Range
Segment 25:	Helmville - Drummond
Segment 26:	Highway 287, Virginia City
Segment 27:	Norris (Highway 84) - Livingston (I-90)
Segment 28:	Livingston - Mammoth Highway 89
Segment 29:	Red Rock Lakes
Segment 30:	Mammoth - Red Lodge
Segment 31:	Highway 2, Missouri Headwaters Three Forks
Segment 32:	Sun River Game Reserve
Segment 33:	Pine Butte and Teton Marsh
Segment 34:	Westcastle
Segment 35:	Fort Macleod - Lethbridge


BANFF
NATIONAL
PARK
BRITISH
COLUMBIA
CALGARY
ALBERTA
MEDICINE HAT
LETHBRIDGE
CANADA
U.S.A.
CANADA
U.S.A.
WATERTON
GLACIER
INTERNATIONAL
PEACE PARK
KALISPELL
0 10 20 30 40 scale in miles
0 10 20 30 40 scale in kilometers
1
2
3
3
4
4
5a
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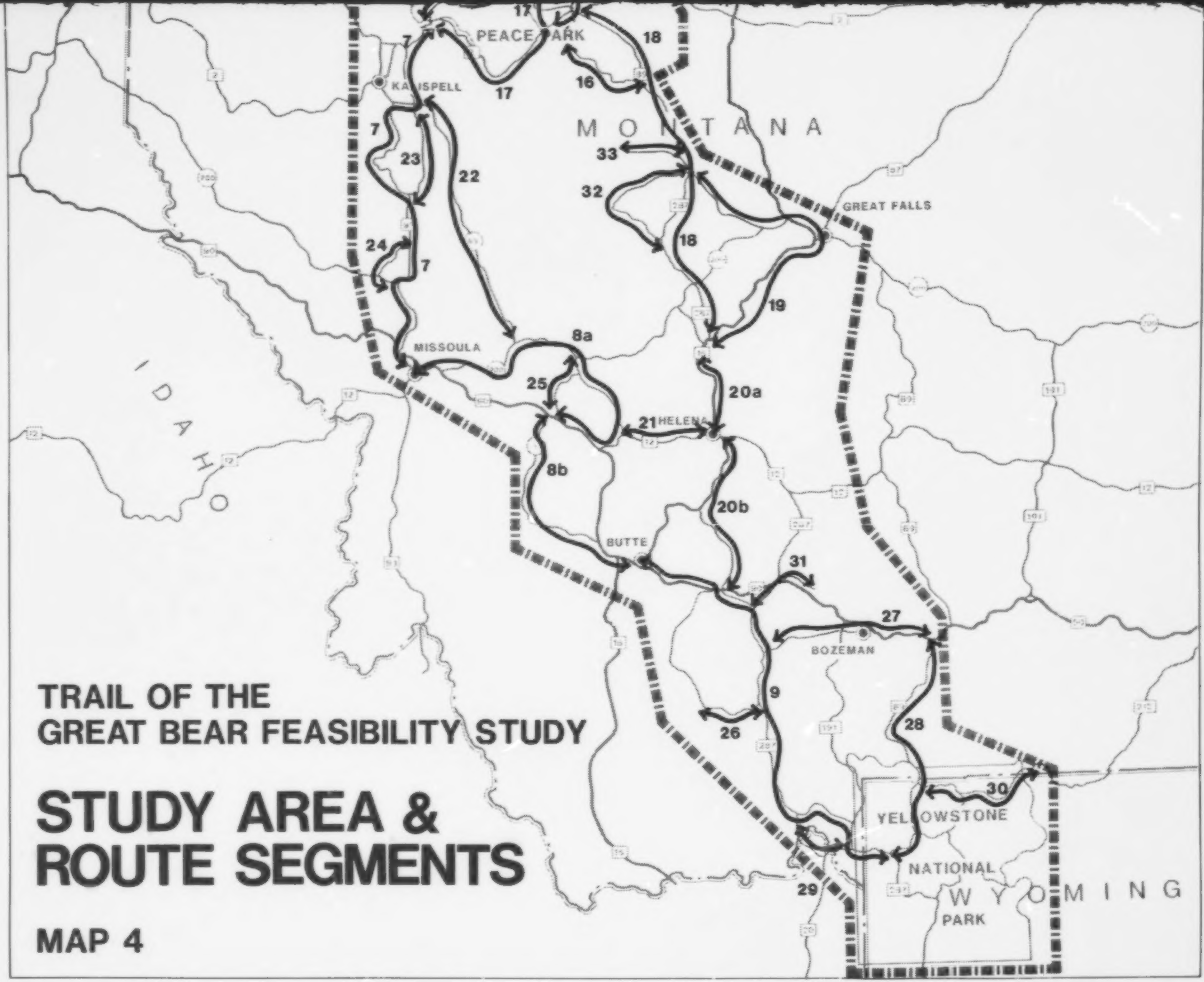
PEACE PARK
KALISPELL
MONTANA
GREAT FALLS
MISSOULA
HELENA
BUTTE
BOZEMAN
IDAHO
YELLOWSTONE
NATIONAL
PARK
WYOMING
7
17
18
16
23
22
33
32
24
19
8a
25
20a
21
8b
20b
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TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

STUDY AREA & ROUTE SEGMENTS

MAP 4

Presentation of Findings

The inventory and assessment is divided into three major areas as follows:

- Principal Route Segments (segments one through thirty-five)
- Other Route Segments (16 in total)
- External Gateways

Each segment contains a general description, a synopsis of the significant themes as well as natural, cultural/historic and tourism resources, and the major segment specific opportunities and constraints.

3.2.2 Theme Summary

The Trail of the Great Bear study area is characterized by a number of natural and cultural/historical themes. Knowledge and understanding of these themes is essential to an appreciation of the unique attributes of the corridor. These themes are referenced in Appendix III.

Major natural resource themes are categorized under four areas: Natural Regions, Wildlife, Exceptional Habitats and Landforms. A listing of natural resource themes follows:

MAJOR NATURAL RESOURCE THEMES

Natural Regions
- Broad Valley Rockies
- Columbia Rockies
- Foothills
- Northern Rockies
- Continental Divide
- Rocky Mountain Front
- Rocky Mountain Trench
- Yellowstone Rockies

Wildlife
- Blue-ribbon Trout Streams
- Large Mammals

Exceptional Habitats
- Foothills Parkland
- Old-growth Forests
- Riparian Habitats
- Wetlands

Landforms
- Batholiths
- Canyons
- Earthquakes
- Ice Caves
- Intrusive Dikes
- Laccoliths
- Lakes
- Landslides
- Lewis Overthrust
- Limestone Caves
- Patterned Ground
- Springs
- Thermal Features
- Volcanic Rocks
- Megablocks

Major cultural/historic themes are categorized under two areas: Native Peoples and Non-native People. Each has a number of subthemes as follows:

MAJOR CULTURAL/HISTORIC RESOURCE THEMES

Native Peoples
- Traditional Native Culture and Land Use History
- Trails
- Buffalo Jumps
- Chert and Obsidian Mining
- Spiritual
- Reserve Period

Non-Native People
- Exploration and Fur Trade
- Whiskey Trade
- Military and Police "Law and Order"
- Ranching
- Ethnic Settlement
- Settlement Towns and Cities
- Mining - Hard Rock
- Mining - Coal
- Mining - Limestone
- Oil and Gas
- Forest Products
- Transportation
- Transportation - Railroads
- National Park Values and Land Use History
- Recreation - Hotels and Lodges
- Human and Natural History Interpretation
- Natural Disasters
- Others

A detailed description and explanation of the natural and cultural/historic resource themes are presented in Appendix III.

3.2.3 Inventory and Assessment Summary

Introduction

The Trail of the Great Bear study area contains an enormous number of resources with strong appeal to worldwide tourism markets. Most regions are easily accessible from major national and international gateways, commercial airports, highways and rail corridors.

With the exception of a few service centres, visitor services are generally satisfactory but not luxurious. Opportunities exist for tourism development in terms of expanding services at certain service centres and increasing the number of facilities, such as guest ranches, which can provide bases from where visitors can explore and enjoy the region's natural, cultural and historical resources. Opportunities also exist to improve and maintain the natural, historical and cultural resources and the understanding of these resources through better protection and interpretation. A variety of recreational facilities and attractions are available as are full service resorts, towns and cities offering shops, theatres, events and other visitor services.

The study area is rich in the history and culture of both native and non-native peoples, and abounds in wildlife habitat, wildlands and unique geological formations. In addition, the terrain varies from broad grassland valleys, through foothills and mountains, the past and present habitat of the grizzly bear and many large mammals. Wetlands provide habitat for hundreds of thousands of wildfowl. The area includes some of the best trout streams in the world.

This is a region with rich and unique resources, the last of their type in North America. The area should be highly valued and its resources used with extreme care.

Overview of Natural Resources

The Trail of the Great Bear study area encompasses wildlife, fisheries, geological, hydrological and vegetation features which are significant on a global scale. The Trail links the first national park in Canada with the world's first national park in the United States through the first international peace park. Complementing these national parks are a variety of designated wilderness areas, wildlife refuges, wildlife management areas, state and provincial parks, and roadless areas.

Four major sections of the Rocky Mountains are represented along the Trail of the Great Bear; the Northern, Broad Valley, Columbia and Yellowstone Rockies. These vary from the more subdued and drier Broad Valley Rockies of central Montana, to rugged ranges like the Columbia Rockies with their lush coniferous forests and alpine meadows. Still impressive, the Northern and Yellowstone Rockies tend to be drier, the former largely made up of massive blocks of uplifted sedimentary rocks while the latter have a high proportion of distinctive volcanic rocks.

Along the eastern edge of the Rockies, north of Waterton, are rolling foothills which contain a scenic mosaic of grassland, deciduous shrubbery and trees opening to dense montane coniferous woodlands and rock outcrops. From Waterton south, the Northern Rockies rise abruptly and majestically from the gently rolling plains.

These landscapes support diverse environments ranging from permanent snow, icefields and lush alpine meadows through subalpine and montane coniferous forests to grassland and foothills aspen parkland which is unique in North America. Large wilderness tracts are home to concentrations of viewable large mammals such as elk, mule deer, moose, pronghorn, bighorn sheep, mountain goat and grizzly bear. "Blue-ribbon" streams support some of the finest trout fisheries found anywhere. Major wetlands are used by significant numbers of migrating and breeding waterfowl while extensive riparian habitats form emerald threads along the major rivers which are important for a diversity of songbirds and other wildlife. Magnificent old-growth forests, which are becoming increasingly scarce, provide shelter for a distinctive set of plants and animals.

The Trail of the Great Bear study area is also blessed with a range of impressive physical features including unrivalled thermal features, major springs, intriguing rock formations, spectacular canyons, caves, two of the largest landslides in North America, patterned ground, an earthquake zone, and igneous rock formations which have weathered into mesas and rock walls.

Interpretation of natural features is low-key or non-existent in many areas. In several cases, important features are not marked on highway maps or road signage. There is little information on their significance and how to access them. Increased information through signage and print material would help draw visitor attention to these resources.

While many major features lie in "protected areas", there are significant wildlands and wildlife areas which have not been formally protected. Some of the more important include proposed additions to the Bob Marshall Wilderness Complex and components of the Greater Yellowstone and Greater Waterton-Glacier (Crown-of-the-Continent) ecosystems. Developments surrounding the established protected areas threaten resources within their boundaries. Protection of additional key lands would ensure long-term maintenance of the wildlife and wildland tourism resources.

The importance and diversity of the wildlands throughout the study area mandates a careful approach to the protection and increased tourism use of these sensitive resources. Environmental assessments of proposed developments, increased interpretation of the natural resources, and innovative approaches to accessing features would help reduce conflicts and damage. The major natural resources are highlighted on maps 1/1, 2/1 and 3/1 in Appendix IV.

Overview of Cultural/Historic Resources

Human beings have been integral components of the Trail of the Great Bear ecosystem since they began their collective evolution some 10,500 years ago. The landscape evokes the past including the Buffalo Days of the Native People and first settlement by non-native people. Along the Trail the past flows through the present into the future. It is truly the "Last, Best, West". Native and non-native cultural resources of national and international significance and interest to the traveller occur along the Trail.

Native Cultural/Historic Resources

The Native Peoples, today and in the past, are a strong unifying link between the Trail's natural and cultural resources. Their culture and land use history extends back to the closing millennia of the last Ice Age some 11,000 or more years ago. They left behind a rich and varied record at many locales along the Trail, interconnected by a well defined system of trails. The most significant of these is the Old North Trail, portions of which are visible within the

Trail of the Great Bear study area, but are uninterpreted and are in danger of being destroyed. Particularly significant areas identified through past archaeological research include Crowsnest, Waterton-Glacier and Yellowstone. These have yet to be developed for public interpretation. Other areas with great potential which have not been studied in any detail include the Porcupine Hills, Peigan and Blackfeet Reserves.

The Native Peoples developed a highly sophisticated and complex culture centred around the hunting of buffalo. Among the most important of the methods used were the jumping of herds of buffalo over cliffs. The vast majority of jumps are located in the plains and foothills of Alberta and Montana. Many were destroyed by bone miners and arrowhead collectors. Some are protected and developed for public interpretation including Head-Smashed-In Interpretive Centre, a UNESCO World Heritage Site in southern Alberta, and the Madison Buffalo Jump in southwestern Montana.

Within the study area are some of the largest and most important Native chert and obsidian mines in the Rocky Mountains. These include Obsidian Cliffs in Yellowstone National Park, a complex of chert quarries in the Central Montana Rockies and a quarry in the Crowsnest Pass. The sites contain a variety of visible mining features capable of public interpretation. Most are not protected.

The traditional spirituality of the Native Peoples is intimately linked with other living beings, the landscape and environment in which all of creation coexists. The Peigan, like peoples everywhere, have a sacred geography with sacred places and spaces still used today by traditional people. Chief Mountain is the Peigan's sacred mountain. Rock art and sacred circles (medicine wheels) also occur within the study area. Very few are protected. Some are suitable for interpretation.

The Peigan and other member tribes of the Blackfoot were the last of the Plains tribes to take treaty. The record of their outstanding cultural achievements during the Buffalo Days and the impact of non-native culture and policy on their traditional ways of life are among the most significant in North America. Neither theme is adequately interpreted.

Non-native Cultural/Historic Resources

The region was first explored in the late 1700's and early 1800's by English, Canadian and American fur traders and explorers. Although the region was rich in fur, the lands were primarily Peigan territory. They discouraged the establishment of posts with the result that the most important fur posts were established on the periphery of Blackfoot territory. Two posts, Fort Connah in the Flathead Valley, and Old Bow Fort on the Bow upstream from Calgary, have potential for interpretive development. Neither are protected.

The years 1868 - 1874 were marked with the establishment, by American traders, of a number of trading post in todays' southern Alberta. These are best known for their trade of "whiskey" to the Natives. They had a major negative impact on traditional Native culture and population and were the reason the North West Mounted Police were established. A number of the posts lie on or in close proximity to the study area, including the notorious Fort Whoop-Up, a National Historic Site, near the city of Lethbridge. A replica of this fort has been developed for interpretation in the city's Indian Battle Park.

The bringing of "law and order" to the American and Canadian west, while different in concept and application, in the end had similar consequences for the Native peoples both north and south of the "Medicine Line". Fort Macleod, a National Historic Site and the principal establishment of the North West Mounted Police, and one of many U.S. army military forts, Fort Shaw, are located in the study area. Opportunities exist to interpretively enhance as well as extend these themes to other sites within the study area.

Beginning in the late 1850's, treaties were signed and eventually the Natives were confined to reserves of diminishing proportions. Government policies and missionizing activities on the reserves had a major impact on traditional native culture. This part of history is represented, both in Montana and Alberta, by a number of agency and mission sites. Many are in the study area and are suitable for interpretive development. None are protected.

One of the major focuses for the cattle industry in the late 1800's was the foothills and eastern slopes of the Northern Rockies. This area, the best rangeland in North America, was the last to be developed. There are many historic ranches within the study area. Large corporate ranches are represented by the Grant-Kohrs National Historic Site in Montana as well as ranches proposed for historic development in southwestern Alberta. The ranching theme is central to non-native settlement history. The ethos of the "Last, Best, West" is very much underdeveloped, interpretively, within the study area.

As ranching and settlement of the lands took hold in the late 1800's, communities grew and flourished. Distinctive streetscapes developed. A number remain today and are designated historic districts, areas and buildings. "Historic" towns such as Fort Macleod and Livingston, and the larger cities of Calgary and Helena, provide opportunities for experiencing the urban architectural and related heritage of the study area.

Montana was the focus of the last gold rushes and mineral development in the American West. Mines, camps, and communities proliferated. Butte-Anaconda is of National Historic significance. A rich and significant visual architectural and historic legacy lies within the Trail of the Great Bear study area for public interpretation and appreciation. Most sites are neither protected or interpretively developed.

Significant coal mining districts developed in the Montana and Alberta Rockies to provide coke for the smelters and steam coal for the railroads. Historic districts/areas such as the Crowsnest Pass in Alberta, an area of National Historic significance with developed and interpreted sites and programs, as well historic districts with development potential such as Red Lodge, Montana, provide the public with an opportunity to appreciate this architectural and historic heritage.

The beginnings and first development of the oil and gas industry in western Canada, lie within the study area, at Oil City in Waterton and at Turner Valley. The Hells Half Acre interpretive development under consideration at Turner Valley would provide a significant interpretive opportunity to travellers.

Four of the major national park complexes, Yellowstone, Banff and Waterton-Glacier, are within the Trail of the Great Bear study area. All four park areas have significant human histories. Architecturally and historically significant administrative structures are associated with these parks. The human history aspect of the "Park Story" receives limited interpretation in park visitor centres or programming and it should be enhanced.

The national parks also contain a number of grand hotels and smaller lodges of considerable architectural interest and historic significance. Many are designated historic sites. For many visitors, these hotels have come to symbolize the parks with which they associate: Old Faithful Lodge with Yellowstone National Park, Many Glacier Hotel with Glacier National Park, Prince of Wales Hotel with Waterton National Park and the Banff Springs Hotel with Banff National Park. The hotel histories extend back to the early years of the parks and the role of the railroads in initial tourism and infrastructure development. Most visitors are unaware of this facet of park history, as there is little formal interpretation.

A large number of museums and interpretive centres exist within the study area. They range from major national and regional centres including the Glenbow Museum, Museum of the Rockies, Montana State Historical Society and C.M. Russell with a diverse range of exhibits and programming, to more focused smaller facilities such as the Museum of the Highwood, Sir Alexander Galt Museum and Archives, Waterton Heritage Centre, Livingston Depot Centre and Museum of the Yellowstone. They provide the visitor an opportunity for more indepth experiences, most of which focus on human rather than natural history. They utilize standard museum display and presentation techniques. Many opportunities for enhancement exist. Other attractions under development include the Remington-Alberta Carriage Centre and the Lewis & Clark Natural History Trail Interpretive Centre.

Two sites which were the location of nationally significant natural disasters lie within the study area; the Frank Slide in the Crowsnest Pass and the Madison Earthquake in southwestern Montana. These historic events serve to illustrate the underlying geological forces of the Rocky Mountains and its impact on human beings.

Significant cultural/historic resources are presented on maps 1/2, 2/2 and 3/2 in Appendix V.

Overview of Tourism Resources

The purpose of preparing an inventory of major existing tourism facilities, services and infrastructure within the Trail of the Great Bear study area has been to develop a general understanding of the number and distribution of facilities along the various route alternatives.

Facilities and services which have been identified are illustrated on the tourism resource inventory maps 1/3, 2/3 and 3/3 contained in Appendix VI. This information has been assembled from existing tourism publications available in Alberta and Montana and a field trip conducted through the study areas to verify the general accuracy of the information. It must be stressed that a comprehensive site inventory was not possible and it is probable that some facilities may have been missed.

Facilities which have been identified, as indicated on the map legends and in the report, include significant recreational facilities, accommodations, food services, information centres, auto service centres, airports, hospitals and other visitor services. Convenient access to those services and facilities is considered important to all visitors to the area.

As illustrated on the inventory maps, existing tourism facilities are concentrated along well travelled routes and around major population centres. This concentration is most obvious in the area of Canmore and south through Kananaskis Country to Longview. Secondary areas of concentration occur in the Crowsnest Pass, Waterton, Glacier and Yellowstone parks, around Flathead Lake southeast of Kalispell, and in the vicinity of population centres such as Lethbridge, Helena, Missoula and Great Falls.

Areas where existing facilities are conspicuously scarce and would need upgrading with development of Trail of the Great Bear include the region between Longview and Highway 3, the area south of Browning and west of Choteau, and the section of Segment 22 between Flathead Lake and Seeley Lake.

However, major tourism attractions are numerous and well dispersed at the north, middle and south part of the study area. In Alberta, they include six ski areas, in Banff National Park, Kananaskis and in Westcastle, as well as three golf resorts, one each in Banff, Kananaskis and Waterton. Guest ranches and outfitters are numerous throughout the area, and the towns of Banff and Canmore, as well as the cities of Calgary and Lethbridge, offer wide varieties of shops, theatre, museums and restaurants. In southern Alberta, attractions include Fort Macleod and its summer theatre, and the art galleries/festivals in the city of Lethbridge.

The Flathead Valley area of northern Montana has developed as a major tourism area, offering downhill ski facilities in winter, eight golf courses, hotels, restaurants, shops and summer theatre and water related activities in summer. In the Missoula - Butte area there are two ski areas and numerous golf courses, located at a full service resort, Fairmont Hot Springs near Anaconda. Helena and Great Falls also offer a number of tourist facilities. At the lower end of the corridor a major four season resort has been developed at Big Sky, offering a broad variety of activities.

3.2.4 Principal Route Segments

Principal route segments are defined as portions of roadway between Banff National Park and Yellowstone National Park accessing the highest concentration of natural, cultural/historic and tourism resources. Segments one through thirty-five were identified as principal route segments.

In this section, each segment identifies significant themes and resources, and outline major constraints and opportunities.

Segment 1: Banff-Highway 40

Segment 1 extends 50 kilometres (30 miles) from the east gate of Banff National Park, along the four lane Trans-Canada Highway to the junction of Highway 40. It includes the major service node of Canmore, with accommodations, foodservices, service stations and retail shops. Located within 80 kilometres (50 miles) of Calgary, this segment has limited well developed historic and cultural resources, but has exceptional natural resources including mountains, rivers, abundant wildlife and excellent trout fishing, all very complementary to the proposed concept.

Significant Themes and Resources

Several relevant themes corresponding to the cultural and natural resource industries are evident including the Northern Rockies, large mammals and the exploration and fur trade.

One of the more significant natural resources in this segment is Wind Valley, a scenic valley which is considered to be one of the finest sheep ranges in the Rocky Mountains. This area also contains major springs which are important for a variety of song birds, and Bow Valley Park which has a variety of glaciation features and interpretive trails. Old Bow Fort and the Morleyville Mission and Settlement are two significant cultural/historic resources.

Tourism services and resources are concentrated in and around Canmore. Some of the more significant include the recreational areas of Lac des Arcs and Deadman's Flats and the Canmore Nordic Centre which was built for the 1988 Olympic Winter Games. As well, two major guest ranches and the Nakoda Lodge Resort, owned by Natives, are also located in this segment.

Opportunities and Constraints

Considering the major highway, as well as proximity to Banff and the major international gateway of Calgary, this segment offers many opportunities for the development of four season tourism services and recreational developments. In addition, there are opportunities for back country hiking, wildlife viewing, enjoyment of natural resources and wildlands and development of interpretive trails and landscapes.

With the exception of areas adjacent to the towns and highways, there is a lack of infrastructure in the form of secondary roads and utilities. Any consequential development would therefore require considerable expense. The area now experiences heavy utilization by visitors and levels of existing tourism would be a significant source of tourism for the Trail. This segment is therefore considered to be of major importance for the Trail of the Great Bear. There are a number of proposed accommodation and recreation facilities for the Canmore area which would also serve to increase the ability to promote Canmore as a full four season area.

Segment 2: Highway 40 - Highwood Junction

Segment 2 extends for approximately 109 km (68 miles) along Highway 40 from the junction with the Trans-Canada Highway in the north, to the junction of Highway 940 and Highway 541 in the south. Along this segment, which travels through Kananaskis Country and Peter Lougheed Provincial Park, there is a wide range of recreational opportunities distributed in close proximity to the highway.

This segment has limited cultural and historic resources. Instead, the emphasis is on the natural environment and recreational activities which include world class summer and winter resort facilities.

Significant Themes and Resources

The themes characteristic of this area include the Northern Rockies and large mammals.

Major natural attributes include the mountains, lakes, streams, wildlife and wildlands. In particular, the alpine meadows, forests, wildflowers and big game animals are draws to this region. Major parks include Kananaskis Country and the Peter Lougheed Provincial Park. Tourism development has included extensive trail development for summer and winter use, ten campgrounds, two visitor centres which provide basic services, three full service hotels, world class golf and alpine ski facilities and a first class two-lane highway, making most of this segment an ideal four season recreational area.

Opportunities and Constraints

The potential exists to designate wildlands. Such formal protection would help to maintain the integrity of the ecosystem and its large mammals. The opportunity also exists for increased interpretation through guided and educational tours in the Kananaskis, and for upgrading and development of tourism services at the Highwood Junction or southern end of the segment. The area has strong tourism recognition and offers numerous recreational oriented attractions.

The lower portion of Highway 40 is closed from December 1 - June 15 annually due to significant wintering elk habitat. Current recreational facilities are already heavily used during the summer months.

Segment 3: Highwood Junction - Highway 22 - Highway 3

Segment 3 extends approximately 155 km (96 miles) from Highwood Junction along Highway 541 to the intersection of Highway 22 and then south on Highway 22 to the intersection of Highway 3 west of Lundbreck. While this segment winds through a variety of attractive landscapes, there are few services or accommodations available.

The overall impression is one of a relatively natural setting. The natural vistas are perhaps not as spectacular as they are in some other segments, however, they do offer a different type of terrain, and hence a different experience for the Trail visitor.

Major cultural resources are located in this segment but have yet to be developed, namely Bar-U and 7-U-Brown Ranches.

Significant Themes and Resources

Two major themes in the area include ranching, and foothills with exceptional large mammal viewing and trout fishing.

Major resources include the Oldman River, a major prime quality fishing stream; and an area known as the Whaleback, one of the most spectacular foothill ridges in Canada. As well, two sites have the potential to be developed as working historic ranches, which will be one of two such ranches within the North American parks systems. This segment has few tourism services, with the majority concentrated in Longview. One provincial park is located in this segment.

Opportunities and Constraints

Opportunities exist for the development of tourism services on the route and upgrading of services at Longview. There is also potential for interpretation, guided horseback tours, construction of viewpoints or rest stops and development of major linkages with other areas along the corridor through joint promotions. Major constraints involve the location of natural resources on public and private land. As a result, interpretation of resources and protection of some areas to ensure quality wildlife and wildland viewing may be difficult.

Segment 4: Crowsnest Pass - Pincher Creek

Segment 4 starts at the Municipality of Crowsnest Pass and follows Highway 3 east to the junction of Highway 6 at Pincher Creek. Services and accommodation are located in the Municipality of Crowsnest Pass, Lundbreck, Cowley, and Pincher Creek.

Segment 4 travels mainly through an agricultural landscape. The natural character includes elements that are both land-based (foothill ridges) and water-based (Crowsnest River). This segment possesses a variety of historical sites which complement the Trail of the Great Bear concept. Of particular importance is the Crowsnest Pass which is the focal point for coal mining development in the Canadian Rockies.

Significant Themes and Resources

The major themes in this area relate to land forms, coal mining, native mining and culture, and massive land slides.

Major resources include the Crowsnest River, one of the best trout streams in Alberta; the Frank Slide, one of the most spectacular landslides in North America; and the Livingston Quarries, the largest traditional native stone tool quarries in the Canadian Rockies. In addition, Crowsnest Pass area contains a number of historic site components relating to coal mining and settlement.

Opportunities and Constraints

Opportunities exist for the development of tourism services in the area, including developing outfitting and guiding services. There is potential for further development of historical and cultural resources, particularly in the Crowsnest Pass where the history of native culture and non-native settlement is important to the overall Trail of the Great Bear concept. Numerous activities are currently being undertaken through the Crowsnest Pass Ecomuseum initiative.

Constraints include limited natural and historic resource development due to diversity of ownership, limited financial resources and competing economic objectives. The lack of developed resources has placed this segment in the position of a pass-through area and therefore it is not currently well identified as a tourism destination.

Segment 5A: Pincher Creek - Waterton

Segment 5A extends along Highway 6 approximately 76 km (47 miles) from the junction with Highway 3 in the north, to Waterton Park in the south. A full range of tourism services can be found along this segment.

This segment contains a diversity of natural resources offering the visitor a unique experience with picturesque lakes and mountains. The most critical resource is Waterton Lakes National Park which also acts as a major service node. This park, with its extensive wilderness and grizzly bear population, is an integral component of the Trail of the Great Bear concept. This segment possesses a number of historical/cultural sites which have yet to be developed.

Significant Themes and Resources

The most significant themes in this area include the Rocky Mountain Front and the national park values and land use history of the Greater Waterton Glacier Ecosystem. This area contains a rugged wilderness area, numerous lakes and streams, good fishing and an abundant variety of wildlife including a major bird migratory route. In addition, Waterton Lakes National Park and adjacent Glacier National Park, form the world's first International Peace Park. Other resources include the Oil City National Historic Site, where the first oil well was drilled in western Canada, and the Prince of Wales hotel complex in Waterton which is of historical and architectural significance. Events include the annual Indian Summer World Aboriginal Film Festival in Pincher Creek and local rodeos.

Services and accommodations along this section are concentrated in Pincher Creek and Waterton Park, with the exception of two campgrounds located north of Waterton Park. Tourism attractions include fishing, watersports, boating and golf in Waterton Lakes National Park.

Opportunities and Constraints

There are numerous opportunities for tourism development in this segment. This is a highly travelled area from which travellers for other portions of the Trail can be drawn. In addition, there are opportunities for upgrading and expanding services at Pincher Creek, development of guest ranches near the Rocky Mountain Front, campground development, and outfitting and guiding operations. There are also shoulder season opportunities such as viewing migratory wildfowl in Waterton and promoting cross-country skiing in the park.

Segment 5B: Waterton - St. Mary

Segment 5B extends approximately 27 miles (43 km) along Canadian Highway 6 and Montana Highway 17 and U.S. Highway 89 to St. Mary on the east side of Glacier National Park.

This segment is very scenic with excellent overviews of the majestic and abrupt plains/mountain interface. This route is largely in a wilderness setting, but also contains some sites which are of either historical or cultural significance. These sites are not developed to their fullest and are not interpreted as such. The major draw is Chief Mountain located in Glacier National Park. It should be noted that Glacier National Park falls within both Segment 5B and 6. The Park's resources and features will be mentioned in both those sections.

Significant Themes and Resources

The dominant themes in this section are the Northern Rocky Mountains and native spirituality represented by sacred native sites.

Resources include the exceptional scenery and wildlife with major features including Chief Mountain, the sacred mountain of the Peigan tribe of the Blackfoot Nation which has been the focus of traditional religious activities for thousands of years. Glacier National Park is a major resource. Many Glacier Hotel, one of the earliest lodges in the park, is considered to be an outstanding example of the log construction grand hotel architectural style.

Tourism services and facilities are limited and are concentrated in St. Mary, with several small campgrounds south of the intersection of Montana Highway 17 and U.S. Highway 89 in Babb.

Opportunities and Constraints

The major opportunities in this segment lie with greater planning and interpretation of the resources of Chief Mountain and the development of services at the junction of Canadian Highway 6 and Montana Highway 17. St. Mary's Lake would also provide for development of tourism activities and attractions.

Constraints to development and expanded use of this segment relate to seasonality of services, winter road and border crossing closures and to the importance of Chief Mountain as a sacred symbol of Native Peoples. Sensitive management and off-site interpretation of Chief Mountain is important to the Trail of the Great Bear concept. Other constraints relate to the quality of roads to St. Mary, which in some cases might be considered difficult to access for large tour buses.

Segment 6: Glacier National Park and Going-to-the-Sun Road

Segment 6 commences at St. Mary and includes the spectacular and heavily used "Going-to-the-Sun Road". This highway is acclaimed as one of the outstanding scenic roadways of the world. It extends for approximately 53 miles (85 km) through Glacier National Park. This route offers a variety of natural landscapes including mountains, forests, streams and lakes. The most significant resource is Glacier National Park itself. The park has a historical record relating to pre-park exploration, mineral prospecting and park development, in addition to containing some significant native historic sites.

Significant Themes and Resources

The Columbia Rockies, traditional native culture and land use history, and unique old-growth forests are major themes in this spectacular area.

Hemlock forests are a significant resource and can only be found in this segment. The area has beautiful large mammals and Blue-ribbon trout streams, as well as the most comprehensive trail system found in the study corridor. Logan Pass is one of the few places where visitors can drive to alpine meadows. Services along this route are limited to those at St. Mary and around Lake McDonald, however, they are unique in that they include two historic hotels. A major visitor information centre is located at St. Mary and another on Logan Pass.

Opportunities and Constraints

There are few opportunities for development on this segment due to the nature of the road through Logan Pass. An exception would be upgrading of the immediate area around St. Mary at the intersection of U.S. Highway 89 and Going-to-the-Sun Road.

Constraints relative to this route include the high utilization in summer and minimal ability to absorb more traffic, the fact that Going-to-the-Sun Road is closed in winter and there are also vehicle length restrictions in effect when the road is open. An alternative route around Glacier Park could be considered during the winter season. The unique attributes of this segment make it an integral component of the Trail concept.

Segment 7: West Glacier - Missoula

Segment 7 is a heavily used north-south route extending approximately 156 miles (251 km) from West Glacier to Missoula. This segment utilizes portions of U.S. Highway 2, Montana Highway 40, U.S. Highway 93, Montana Highways 35 and 93 and Interstate 90. Missoula is a major tourism service node and gateway. There is an abundance of tourism services, attractions and activities spread along this route with concentrations around Flathead Lake, Big Fork, Kalispell, Missoula and the numerous smaller communities in between. Kalispell, is a major gateway with numerous services and attractions and has therefore been included in this section. Significant scenic and wildlife attractions exist, including major productive bird habitats. Numerous historical and cultural sites, buildings and towns offer ample opportunities for interpretation.

Significant Themes and Resources

Major themes in this area include lakes, wetlands, blue-ribbon trout streams, riparian habitat and the Columbia Rockies, together with the history and culture of the native reserve period and the non-native exploration and fur trade. There are numerous resources including Flathead Lake, and the Pablo and Ninepipe National Wildlife refuges which support tens of thousands of waterfowl. The Rattlesnake Wilderness is designated as a national recreation area, while the Bitterroot River is an outstanding trout stream. St. Ignatius Mission, and Fort Connah are important historical sites, the latter built by the Hudson Bay Company in 1846.

The segment is also rich in tourism resources, with 85 hotels and 65 campgrounds. Kalispell offers a variety of summer and winter activities including snowmobiling, alpine skiing, golf, shopping and restaurants, as does Missoula at the southern end of the segment. Both municipalities have major commercial airports. Events include summer playhouses, festivals and the Montana Fair as well as several art galleries.

Opportunities and Constraints

Opportunities in this segment relate to Kalispell and Missoula being gateways. These two areas have good infrastructure and services including two commercial airports nearby. They can be considered major access points to the Trail of the Great Bear, and opportunity exists to promote the Trail at these points.

Additional opportunities include enhancing interpretation and signage of both the natural and cultural features. This is the most heavily developed of the primary route segments with the highest concentration of services in the study corridor.

The current high use of this segment could be a major constraint, however, the large number of visitors together with the two gateways of Kalispell and Missoula could form major sources of market demand for other segments of the Trail.

Segment 8A: Missoula - Drummond Highway 200 & 14

Segment 8A extends approximately 129 miles (207 km) from Missoula on Interstate 90 to the junction of Montana Highway 200, where it turns north to follow Montana Highway 200 to its junction with Montana Highway 141, then loops back via U.S. Highway 12 and Interstate 90 to Drummond. Services and accommodations are spread fairly evenly along this segment with slight concentrations in Garrison and Drummond.

This particular segment travels through subdued mountains, largely along valley bottoms. The terrain in the area is characterized by numerous streams and lakes intermingled in the rugged mountains. The segment contains two significant wildlife management areas, Blackfoot-Clearwater and Nevada Lake as well as the Bob Marshall Wilderness Complex. It also contains historical/cultural sites, two of which are currently being developed and interpreted, namely the Garnet Historic District and Grant-Kohrs National Historic Site. The site which may hold the most significance is the Garnet Historic District which presents the best opportunity to interpret early boom town mining history along the Trail of the Great Bear.

Significant Themes and Resources

The major themes in this segment relate to the natural resource base in the areas of hardrock mining and ranching. The area contains large mammals and outstanding blue-ribbon trout streams, Broad Valley and Northern Rockies.

The Garnet Historic District contains one of the last gold mine boom towns in Montana. The Grant-Kohrs Ranch is a working demonstration ranch which is open year-round. Major natural resources include the Bob Marshall Wilderness Complex, encompassing the Bob Marshall, Scapegoat and Great Bear Wilderness areas.

Opportunities and Constraints

This area presents excellent opportunities for interpretation, roadway view points, guided tours, and outfitting.

It is constrained by lack of signage and interpretation, since many of the significant resource locations are off the main route. Consequently, lack of publicity and marketing has inhibited awareness and visitation to this segment, although the wilderness areas themselves are highly used and have suffered considerable damage. Additional promotion and use should emphasize controlled and/or guided tours.

Segment 8B: Drummond - Butte

Segment 8B extends for approximately 82 miles (132 km) from Drummond, south on Montana Highway 1 through Anaconda, and then on Interstate 90 to Butte. Recreational facilities are numerous and concentrated south of Phillipsburg, while accommodations, food and visitor services are concentrated in Anaconda and Butte.

This particular segment offers a variety of landscapes, ranging from cropland to subdued mountains. The area is characterized by rugged wilderness, containing two roadless areas, a wildlife management area, and a wilderness area. It possesses a number of mining sites and structures, many of which are undeveloped or lack interpretation. The opportunity exists to recreate the mining history in the area.

Significant Themes and Resources

Themes in this area include Broad Valley Rockies and large mammals combined with the history of mining.

The Phillipsburg Historic District, and Phillipsburg itself, is one of the finest, most intact examples of late Victorian mining town architecture. The Butte-Anaconda Historical Park System contains a number of historic buildings associated with the mining industries, and is a major interpretive opportunity of international significance. The Anaconda-Pintlar Wilderness is a rugged wilderness area with splendid mountain scenery and large mammal resources, while the Humbug Spires Primitive area offers the best hard rock climbing in Montana.

The area offers well developed tourist services, including a golf and hot springs resort, numerous campgrounds and full service hotels, most of which are located in the Anaconda-Butte node of this segment. The commercial airport at Butte provides direct service to the main airline hub in Salt Lake City. The area also offers a wide variety of recreational activities including lakes, three ski areas, golf courses, outfitting facilities, sports festivals, rodeos, the Museum of Mining and the National Ghost Town Hall of Fame Museum.

Opportunities and Constraints

The potential exists to designate this area as a major tourism zone, emphasizing the mining history and historical park system through development and interpretation, guided tours, and tour packages. The opportunity also exists to combine these tours with the recreational facilities in the area.

This segment is not widely used and remains relatively unknown as a result of limited promotion or publicity.

Segment 9: Butte - West Yellowstone

Segment 9 extends approximately 164 miles (264 km) from Butte via Interstate 90 and Montana Highway 2 and U.S. Highway 287 to West Yellowstone. The bulk of visitor services and accommodations along this segment are concentrated in West Yellowstone and in Ennis.

This route traverses a wide range of low to middle elevation natural landscapes. Many intriguing natural formations can be found including canyons, broad open grassy valleys, rocky ridges, rivers and lakes. Closer to West Yellowstone, dense pine forests can be found. This segment also possesses numerous historic and cultural resources.

Significant Themes and Resources

Segment 9 enjoys the potential for several themes including those relating to history, geology and the natural environment. More specifically, the themes include mining, natural disasters, large mammals and blue-ribbon trout streams as well as the Rocky Mountains.

Many of the significant resources along this segment lack interpretation. Specific resources include the Lewis and Clark Caverns State Park and Jefferson Canyon, Montana's first state park; the Lee Metcalf Wilderness area which encompasses 259,000 acres of spectacular scenery; and a portion of Yellowstone National Park, the world's first national park. The museum at West Yellowstone, a town located just outside the west boundary of the park, contains the best interpretive exhibit on bears within the Trail of the Great Bear study area. Middle Mountain/Tobacco Root Roadless Area is a unique wilderness area which has the potential to reduce some of the pressure from Yellowstone itself. The area also contains the second largest landslide site in North America.

The area is well serviced in the West Yellowstone and Ennis areas, with numerous campgrounds and full service hotels as well as outfitters, shopping, and a commercial airport. Recreational services include hiking trails and guides, snowmobiling and cross country ski trails.

Opportunities and Constraints

Opportunities exist for both expansion and development of tourism services and attractions between West Yellowstone and Butte and for greater promotion of winter visitation to the area. Formal designation of some unprotected areas would help to maintain the integrity of the Greater Yellowstone Ecosystem and could direct tourists from presently overused areas in this segment. Interpretation of mining, development of interpreted highway viewpoints and stops could enhance visits to this area as well. Consideration should be given to the development of a major interpretive and information node at West Yellowstone.

Segment 10: Highways 1 and 22, Highway 40 Junction - Longview

Segment 10 extends for approximately 137 km (85 miles) from the junction of Highway 40 with the Trans-Canada Highway, east and then south on Highway 22 to Longview.

This segment traverses through grasslands and foothills. No distinct natural features are evident.

Cultural and historic resources along this segment are limited and lack interpretation. Perhaps the most significant are the High River whiskey posts. This segment could be an alternative to Segment 2, when Highway 40 is closed.

Significant Themes and Resources

Minor themes in the segment relate to native culture in the reserve period, ranching and settlement and oil and gas development.

Resources are limited, but include Big Rock, an extremely large glacial erratic with pictograph panels painted by the Peigans, and the High River whiskey posts, a focal point of early settlement and one of the best preserved whiskey posts in southern Alberta. Interpretive development of Hells Half Acre, (Turner Valley Sour Gas Plant) the first sour gas processing plant in Canada is being considered by Alberta Culture and Multiculturalism.

Tourism services are also limited. The bulk of recreational and visitor services are concentrated along Highway 22 in the neighbourhood of Bragg Creek. The services are relatively limited with the majority of accommodation being campgrounds. Some unique specialty and antique shops exist in Bragg Creek and in other nearby communities such as Turner Valley and Black Diamond.

Opportunities and Constraints

There are opportunities for interpretation of historic and cultural resources and the potential exists to develop special events and festivals consistent with these resources.

This route is constrained by the lack of scenic resources, but provides a good contrast from the mountain views of Segment 1, in addition to providing some foothills and wildlife viewing, including hawks, deer and small mammals.

Segment 11: Highwood Junction, Highway 940 - Plateau Mountain Natural Area

Segment 11 includes approximately 54 km (33 miles) of improved road south from Highwood Junction on Highway 940, which connects back to Highway 22 about 30 km south of Longview via Highway 532. This segment travels through the southern portion of Kananaskis Country.

The most significant natural resource in the area is the Plateau Mountain area, which is presently under consideration as an ecological reserve. No major cultural or historic resources have been identified. This segment could be an optional route to the northern section of Segment 3.

Significant Themes and Resources

The main theme of this area relates to the Northern Rockies, with resources including Plateau Mountain, an interesting area of tundra vegetation and ice caves. Tourism resources along this segment are limited, with the majority of recreational facilities and campgrounds being located south of Highway 541.

Opportunities and Constraints

Both the closure of the ice caves to the public and poisonous gas wells in the area negatively impact visitation. This area does, however, offer horseback riding, picnicking, hiking and snowmobiling opportunities. Additional opportunities exist for guided tours and interpretation of Plateau Mountain. Some restrictions could occur if Plateau Mountain is designated as an ecological reserve.

Segment 12: Highwood Junction - Coleman

Segment 12 extends for approximately 106 km (66 miles) along Highway 940 from Winston Creek in the north to the junction with Highway 3 in the south.

This segment winds through an intermountain valley that contains some spectacular scenery. Cultural and historic resources along the segment are minimal, with only one identified native sacred site.

Significant Themes and Resources

The major themes in this area include the Northern Rockies, excellent trout streams, large mammals, and native spirituality.

Resources include the Beehive Natural Area with old-growth forests and a variety of wildlife habitats; the north fork of the Oldman River which is a prime trout stream; the Livingston Gap, a dramatic canyon created by the Oldman River; and Oldman's Bowling Green, a Peigan sacred site. Tourism resources are limited. Campgrounds are distributed evenly along this segment.

Opportunities and Constraints

Opportunities exist to enhance wildlife and wildland habitat through greater protection of the Beehive Natural Area.

This route is partially constrained as Highway 940 which is gravel, is not maintained in the winter months, and by the reduced quality of the scenery from clear-cut logging.

Segment 13: Head-Smashed-In Loop

The Head-Smashed-In loop is made up of 160 kilometres (99 miles). The segment travels east from Pincher Creek along Highway 3; at the Highway 785 junction the segments forms a loop. The north loop follows Highway 785 north and east past the Head-Smashed-In Buffalo Jump Interpretive Centre, connecting with Highway 2 north of Fort Macleod. From this point it travels north on Highway 2 to Claresholm and then proceeds west on Highway 520 to connect with Highway 22. The south portion continues east on Highway 3, from the Highway 785 junction, past Brocket to Fort Macleod, connecting with Highway 2.

The route traverses through farm and ranch lands. The most significant natural features in the area are that of the Oldman River and the Porcupine Hills. Both areas support large bird and wildlife populations.

This segment contains several developed historic and cultural resources, one of which is a World Heritage Site and a major tourist attractor. In addition, some historical/cultural sites exist which have yet to be developed and interpreted. Community oriented festivals held in Fort Macleod and on the Peigan Reserve complement the attractions in this segment.

Significant Themes and Resources

Several themes and major resources exist in this loop. Themes include foothills and ranching, native culture and land use history, white settlement and the establishment of law and order. The major wildlife theme relates to the riparian habitat in the area.

More specifically, resources include the Porcupine Hills and Oldman River Valley which contain spectacular wildflower blooms in spring and one of Canada's most extensive riparian habitats. Cultural resources include Head-Smashed-In Buffalo Jump Interpretive Centre, a designated Provincial Historic Resource and UNESCO World Heritage Site and the largest, best preserved and longest continuously used bison jump known in the world. In addition, this segment includes the Old North Trail, a traditional native trail and the Peigan Indian Reserve. Fort Macleod I & II, represent non-native settlement and the establishment of law and order. Fort Macleod I is of national historic significance and in 1874 was headquarters for the North West Mounted Police. The fort was flooded by the Oldman River whereby a second fort was established on higher ground (Fort Macleod II).

Tourism services and facilities are concentrated in Claresholm and Fort Macleod, with limited services available in other small communities. Services include 11 hotels and motels, four campgrounds, two golf courses, two small airstrips and a tourist information centres in Claresholm. A live theatre at Fort Macleod and two annual festivals complement the resources.

Opportunities and Constraints

Numerous opportunities exist. Head-Smashed-In Buffalo Jump Interpretive Centre is a focus for international visitors to southwestern Alberta. This fact, and its proximity to the Calgary international gateway, make it an excellent location for exposure of the Trail of the Great Bear. In addition, there are many opportunities to expand tourism services around Fort Macleod and Head-Smashed-In, including overnight accommodations, recreation facilities and related services. As well, upgrading and enhancing of interpretive exhibits and programs could greatly enhance the attractiveness of area resources.

Segment 14: Waterton-Cardston-Chief Mountain Loop

This loop, which bypasses the summer-only connection from Waterton to Montana Highway 17, is approximately 219 km (136 miles) long and travels along Highway 5 from Waterton Park to Cardston, then via Canadian Highway 2 and U.S. Highway 89 south of the U.S./Canada border.

This segment is highly scenic in places, with excellent views towards Chief Mountain. Cropland and tame pasture occupy a substantial portion of the segment.

This segment possesses a major historic resource, the Remington-Alberta Carriage Centre.

Significant Themes and Resources

The natural themes in Segment 14 include the Rocky Mountain Front and foothills parkland, while historical themes include transportation and the development of the Mormon Church.

In this regard, the resources of the area include the Mormon Temple which was the first temple constructed outside the United States. The other major resource is the Remington-Alberta Carriage Centre which will open in 1992. This centre will contain audio-visual theatre, exhibit galleries, events and a tourist centre. It will become a major regional tourist attractor, capturing a significant portion of the pass through, Banff or Waterton/Glacier, destined American traveller.

Tourism resources are concentrated in Cardston and include three hotels and four campgrounds. Recreational facilities include a golf course and an outfitting service. An annual festival, Heritage Days, is held in Cardston.

Opportunities and Constraints

The natural and historic resources in this segment make it a good alternate to the heavily travelled Waterton-Montana Highway 17 section. It also has longer U.S./Canada customs office hours and is open all year round.

Segment 15: Duck Lake-East Glacier

Segment 15 travels for approximately 55 miles (89 km) from U.S. Highway 89 at Babb along Secondary Route 464 to Browning, and then southwest to East Glacier via U.S. Highway 2. Relatively few services or facilities are located along this segment.

The route traverses through foothills and pastureland and has no major natural features.

Significant Themes and Resources

There are no significant known themes or resources on this route except at Browning, which is described as part of Segment 18.

Opportunities and Constraints

This segment could alleviate heavy traffic on Highway 89 during the peak season.

Segment 16: Heart Butte Loop

Segment 16 extends for approximately 50 miles (80 km) south of Browning, through Heart Butte and rejoins U.S. Highway 89 just north of the Montana Highway 44 junction at Birch Creek. There are no significant accommodations, services or facilities on this loop.

The route winds through strongly rolling countryside and offers impressive views west to the nearby Rocky Mountain Front Ranges.

The significant resource is the Blackfeet Indian Reserve which contains numerous native archaeological sites.

Significant Themes and Resources

Themes on this route relate to the Rocky Mountain Front, blue-ribbon trout streams and the native reserve period.

Resources include the Blackfeet Reservation which possesses significant traditional native sites and the Two Medicine River/Badger Creek streams, part of the proposed Two Medicine Tribal wilderness and a major wildlife corridor between the Bob Marshall Wilderness Complex and Glacier National Park.

Opportunities and Constraints

Opportunities exist for the development and enhancement of native resources on the Blackfeet Reservation. There is a major gap along the Trail of the Great Bear of native developed and operated interpretive components, relating to traditional and contemporary culture.

Segment 17: St. Mary-East Glacier-West Glacier

Segment 17 includes approximately 87 miles (140 km) of highway south from St. Mary on U.S. Highway 89 to Kiowa, then to East Glacier on Montana Highway 49, and finally around the south side of Glacier National Park via U.S. Highway 2 to West Glacier.

The route travels through a variety of landscapes and offers the visitor numerous scenic vistas including foothill ridges, impressive flower blooms, beaver pond complexes and lush green forests. The most significant resources along this segment would be Glacier National Park itself. Cultural and historic resources are limited and remain undeveloped.

Significant Themes and Resources

The Rocky Mountains, large mammals, blue-ribbon trout streams and native culture and land use history make up the major themes along this segment.

Supporting these themes are resources which include Glacier National Park and the Bob Marshall Wilderness area, as well as the Blackfeet Reserve and East Glacier Park Lodge, noted for its unique log architecture. A unique tourism resource in this area is the AMTRAK depot, the major AMTRAK entry point for tours into Glacier National Park. A full range of tourism services are provided at Essex and East Glacier, most operating on a seasonal basis only.

Opportunities and Constraints

Opportunities exist for more highway viewpoints and rest areas along the route. As well, the expansion of seasonal operations into shoulder months will allow for enhanced visitation. The potential also exists to develop a tourist information centre near East Glacier Park Lodge. This will allow for the promotion of the Trail of the Great Bear to AMTRAK tours.

Segment 18: Browning-Wolf Creek

Segment 18 extends for approximately 134 miles (216 km) southeast from Browning on U.S. Highway 89 to Choteau, then via U.S. Highway 287 to Wolf Creek.

This route offers a scenic drive with good views of the Rocky Mountain Front Ranges. Several river valley crossings add visual interest. Of particular importance, this segment offers direct access to the Rocky Mountain Front and to Segments 32 and 33.

In addition, several underdeveloped historic and cultural sites are in existence, which focus around the native reservation period and native culture.

Significant Themes and Resources

Themes in this sector are both natural and historic. They include the Rocky Mountains and Broad Valley Rockies, as well as traditional native culture, the native reservation period and the history of non-native settlement.

One major resource is the Museum of the Plains Indian in Browning which holds the most complete and significant collection of Blackfeet and related ethnographic materials within the study area. Other resources include the Missions of St. Peter and Holy Rosary and the historic community of Choteau. Tourism services and resources remain relatively undeveloped and are concentrated in the towns of Choteau, Augusta and Browning. Accommodations consists of 10 hotels and motels and four campgrounds. Recreational facilities include one golf course and twelve outfitting services. The North American Indian Days Festival is held in Browning annually, and complements the other cultural resources.

Opportunities and Constraints

Browning is the headquarters for the Blackfeet Tribal Business Council and a centre of reservation activity. Some opportunities exist to better interpret the native culture town.

Opportunities also exist to upgrade the quality of tourism services in both Browning and Choteau.

Segment 19: Choteau-Great Falls-Wolf Creek

Segment 19 extends for approximately 103 miles (166 km) from Choteau, southeast on U.S. Highway 89 to Great Falls, then southwest on Interstate 15, parallel to the Missouri River, to the junction with U.S. Highway 287.

Great Falls is a gateway and major service node. In addition to offering a full range of visitor services, Great Falls hosts numerous special events.

The route is very scenic and travels through cropland and grasslands. The area contains two major wildlife areas which possess hundreds of thousands of waterfowl during migration. Historic and cultural resources prevail in this segment, however, many remain undeveloped. The majority of the cultural/historic resources are concentrated in Great Falls.

Significant Themes and Resources

Segment 19 has major themes corresponding to wetlands and blue-ribbon trout streams. Other major themes include exploration and fur trade, human and natural history interpretation and the native reserve period.

Resources include many wetlands and water based resources, including Giant Springs State Park which contains the largest freshwater springs in the United States. Freezeout Lake Wildlife Management Area and Benton Lake National Wildlife refuge have enormous populations of wildfowl. This region also contains the headwaters of the Missouri River as well as Ulm Pishkun State Park which has a large buffalo jump. As well, the Charles M. Russell Museum complex, which focuses on Russell's life, is located along this segment as is a major art centre situated in Great Falls and the Lewis and Clark Natural Trail Interpretive Centre, currently under development in Great Falls.

Tourism resources are located primarily in the Great Falls area with eight campgrounds and 34 hotels and motels. There are numerous recreation facilities in the vicinity of Great Falls as well as an annual state fair and art auction.

Opportunities and Constraints

With a concentration of visitor services and a commercial airport in Great Falls, the opportunity exists for this area to be a major gateway to the Trail of the Great Bear. However, some enhancement of the resource base is required in the form of increased signage and interpretation. The intensity of commercial and industrial development in the area reduces its compatibility with the Trail of the Great Bear concept.

Segment 20A: Wolf Creek-Helena

Segment 20A, extending from Wolf Creek to Helena, is approximately 36 miles (58 km) long. Services and accommodations along this segment are concentrated within and near Helena, a major service node which has been intensively developed for urban and agricultural use. The rest of the route travels primarily through wilderness areas. This segment utilizes Interstate 15, Secondary Route 279 and U.S. Highway 12.

Historical and cultural resources are focused around mining and exploration. Two historic districts are present. The key feature of this segment is the Helena Historic District.

Significant Themes and Resources

The themes in this area include mining and Broad Valley Rockies.

The segment passes through the Gates of Mountains Wilderness, a huge wilderness area which is one of the least used wildlands in Montana and which contains one of the most spectacular canyons on the Missouri River. Historical resources include the Marysville Historic District and Helena Historic District. The first is a historically interesting mining town, while the second contains 53 restored and renovated historical buildings. The Montana State Historical Society has one of the most important collections of Charles M. Russell art.

A full range of tourist services, including 19 hotels, are concentrated in Helena. Camping facilities are evenly dispersed east of Interstate 15 near Holter Lake, Lake Helena and Canyon Ferry Lake. Helena also possesses numerous recreational attractions including a groomed snowmobiling loop, and hosts some special events including an annual rodeo.

Opportunities and Constraints

There are several opportunities for enhancement of interpretation of historical and natural resources and of promotion of annual events in Helena. In addition, Helena has a major commercial airport and as such can be a gateway and promotion centre for the Trail of the Great Bear. However, the intensive commercial development is not consistent with the Trail of the Great Bear Concept.

Segment 20B: Helena-Whitehall

Segment 20B extends 59 miles (95 km) south from Helena via Interstate 15 to the junction with Montana Highway 69, and then to Interstate 90 west to Cardwell.

Significant Themes and Resources

The significant theme in this area is mining. Resources include Elkhorn, a historically significant ghost town. In addition, several small communities located along this segment have a historical mining background. Recreational activities include snowmobiling, hiking and riding. Other tourism resources are limited.

Opportunities and Constraints

The mining theme in this area could be developed or enhanced through increased interpretation and guided tours. Elkhorn State Park has potential as a point of interest for visitors.

Segment 21: Helena-Avon

This 33 mile (53 km) route climbs over a low mountain range via U.S. Highway 12 west between Helena and Avon. It has little in the way of accommodation or services and possesses limited natural and historic/cultural resources.

Significant Themes and Resources

The major theme for this area is the Broad Valley Rockies. Wildlife viewing opportunities exist in the Electric Peak Roadless Area, an area containing 46,000 acres along the Great Divide which has had little promotion or development. Tourism resources and services are minimal and limited to campgrounds and one cross country ski area.

Opportunities and Constraints

The development of highway signage, viewpoint stops and an area guidebook are all opportunities which could enhance the use of this segment and increase public awareness of the resources. However, this route is already fairly heavily used as a direct route between Helena and Missoula.

Segment 22: Swan River Valley

This segment travels south-easterly for approximately 91 miles (146 km) along Montana Highway 83 from the junction with Montana Highway 35 north of Big Fork to the junction with Montana Highway 200 in the south. The natural features in this area are significant. Some of the most diverse and attractive landscapes can be found in the Swan Lake and Seeley Lake area. Spectacular wilderness areas can be accessed via this route.

Significant Themes and Resources

The themes characteristic of this segment relate to the natural resources. They include the Columbia Rockies, old-growth forests, wetlands and large mammals.

The natural resources in this segment are very distinct. Of most significance are the Bob Marshall Wilderness Complex and the Clearwater-Swan Valley Slope, unique wilderness areas containing abundant vegetation and a variety of bird life, grizzly bear populations, elk and sheep. In addition to these resources, both Jewel Basin, a scenic mountainous area, and the Mission Mountain Wilderness, also offer key wildlife viewing.

Tourism services are limited to 12 campgrounds and six motels/hotels concentrated in the small communities of Condon and Seeley Lake. Wilderness-related recreational activities are available along Segment 22, but these facilities receive very little publicity and remain relatively unknown.

Opportunities and Constraints

This area possesses significant wilderness areas and other natural resources. The potential exists to enhance public awareness of the fragility of these unique areas through interpretation and signage. Protection of these critical areas must be pursued as they provide a major migratory route for grizzly bear and elk. Due to lack of protection, some areas of the wilderness are already experiencing heavy use and damage. In particular, old-growth forests along the Clearwater-Swan Valley are being clear-cut by logging operations.

Segment 23: East Side Flathead Lake

This segment covers approximately 34 miles (55 km) and travels around the east and south sides of Flathead Lake. Beginning at the junction with Montana Highway 82, it follows Montana Highway 35 to its junction with U.S. Highway 93, east of Polson. Resources are relatively limited.

Significant Themes and Resources

This short segment does not have any themes of particular relevance to this study. The route traverses the east shore of the Flathead Lake and offers limited opportunities for panoramic overviews. There are no significant cultural and historical sites. With the exception of some camping and hiking on the southeast side of Flathead Lake, all services and facilities are concentrated in the Big Fork area. Most of the land in the area bordering the lake is owned by local inhabitants and cottagers, some of whom have developed cherry orchards, apple orchards and vineyards.

Opportunities and Constraints

Due to limited resources along this segment, little opportunity exists for development, except for some viewpoints overlooking the lake, with picnic facilities.

Segment 24: Highway 212, National Bison Range

Segment 24 extends approximately 43 kilometres (27 miles). It leaves U.S. Highway 93 south of Ronan via Secondary Route 212 and runs adjacent to the National Bison Range to a junction with Montana Highway 200 then eastward via Montana 200 to the junction with U.S. 93 at Ravalli.

Significant Themes and Resources

The themes characteristic to this segment include Broad Valley Rockies, large mammals and the native reservation period. The most significant resource is the National Bison Range. The range contains approximately 400 buffalo in addition to herds of elk, antelope, deer and mountain sheep. It provides a prime opportunity to view wildlife in the wilderness. Tourism services and resources are extremely limited.

Opportunities and Constraints

This segment is a secondary highway and could be an optional route to the heavily travelled U.S. Highway 93 between Missoula and Kalispell. The opportunity exists to disperse traffic from onto this short segment through increased promotion of the National Bison Range.

One major constraint is that the bison range is open from mid-May to mid-October only, hence, this attraction/segment could be a seasonal alternative.

Segment 25: Helmville-Drummond

This segment is approximately 19 miles (31 km) long and travels along secondary improved Highway 271 from Helmville to the junction with Interstate 90. There are no significant accommodations, services or recreational facilities. The road traverses through a wilderness area characterized by subdued mountains and forests. No significant features exist along this segment.

Significant Themes and Resources

There are no significant themes and natural, cultural and tourism resources are limited. The route does, however, link with the Garnet Historic District, one of the two best preserved ghost towns in the state.

Opportunities and Constraints

This short segment provides a direct linkage to Highway 90 providing a pleasant alternative to the highway. This highway is a more direct route into Missoula. In addition, Segment 25 is an alternate route for accessing Butte.

Segment 26: Highway 287, Virginia City

Segment 26 is a 19 mile (31 km) length of Montana Highway 287 stretching west of Ennis to Nevada City.

This short segment could act as an interesting side trip from the main route, Montana Highway 287. The drive is scenic with overviews of the Madison Valley and the Lee Metcalf Wilderness and offers the opportunity for visitors to explore unique sites in the gold mining towns of Virginia and Nevada cities.

Significant Themes and Resources

The most prevalent theme along this short, secondary segment is gold mining. The two key resources which relate to this theme include the historic mining districts of Virginia and

Nevada cities. Virginia City is one of the oldest cities in the state. Today, it is a popular tourist attraction with many restored historic buildings. Nevada City sprang up with the discovery of gold in 1863 and possesses many historic structures.

Tourism services and resources are limited and concentrated in the small communities of Virginia and Nevada cities. Virginia City does have an opera house which could offer the Trail of the Great Bear visitor a different experience. Recreation facilities/activities in the area are limited.

Opportunities and Constraints

The major opportunities in this segment relate to increased interpretation of the gold-mining themes in the two towns. Linkages can then be made with other gold-mining areas along the Trail of the Great Bear corridor. Also, there is potential to enhance the historic integrity of these two towns through upgrading and planning.

A major constraint to the above, is the presence of inappropriate tourism attractions which detract from the historic values of the mining towns.

Segment 27: Norris (Highway 84)-Livingston (I-90)

Segment 27 extends for approximately 63 miles (101 km) from Norris, east along Montana Highway 84 to Bozeman, a major service node, continuing along Interstate 90 to Livingston.

This route traverses a variety of very scenic landscapes including Bear Trap Canyon and the Bridger Range to the north. A few historic and cultural resources are located in Bozeman including a mix of historic buildings and districts in addition to more culturally oriented features such as festivals and an arts centre. The Museum of the Rockies is a focal attraction for visitors travelling in southern Montana. Bozeman acts as a gateway to the nearby mountains and to Yellowstone National Park. Segment 27 provides a direct and important link to Bozeman from Highway 287.

Significant Themes and Resources

The natural theme in this segment is Broad Valley Rockies, a distinctive area of high and isolated mountain ranges. Cultural and historic themes relate to both the native people and to non-native settlement in the late 1800's when communities grew and flourished.

Significant resources reflecting these themes include the Lee Metcalf Wilderness/Madison River, a large wilderness area with spectacular scenery and important populations of animal life; the Bridger Range, an isolated block of national forest land; and Madison Buffalo Jump State Park, a typical small buffalo jump with a discontinuous record of use. In addition, Bozeman, a major node along this segment, possesses numerous historic buildings and districts. The Museum of the Rockies located in Bozeman, interprets the history of the area.

Tourism resources are concentrated in the Bozeman area. Services are well developed and include accommodations ranging from campgrounds to hotels and motels. The city holds major special events including the College National Finals Rodeo, the Montana Winter Fair, and the Sweet Pea Festival, a four day celebration of the arts. A commercial airport is also available.

Opportunities and Constraints

As this segment accesses Bozeman directly, a major service node and gateway to Yellowstone Park, the potential exists for the Trail of the Great Bear to gain increased exposure. The Museum of the Rockies in Bozeman offers an excellent opportunity to disseminate information on the Trail and to develop joint interpretive programming.

Segment 28: Livingston-Mammoth Highway 89

This segment extends for approximately 156 miles (251 km) from Livingston on U.S. Highway 89 to Madison Junction in Yellowstone National Park. It winds along the floor of the Yellowstone River Valley and offers some spectacular views. This segment also possesses a variety of historic and cultural resources. Livingston offers some interesting sites which focus on non-native settlement and the railroad. Segment 28 is a viable alternate route and can easily be incorporated into the Trail of the Great Bear concept.

Significant Themes and Resources

Major themes include blue-ribbon trout streams, Yellowstone Rockies, large mammals and human history interpretation.

Resources include the Absaroka-Beartooth Wilderness which encompasses almost 950,000 acres and offers breathtaking scenery, numerous wildlife viewing opportunities, and excellent fishing. The Devil's Slide is another natural attraction with intriguing sections of sandstone and shale. The two major historical attractions include the Livingston Depot Centre, a satellite exhibit centre operated by the Buffalo Bill Historical Centre, and the Six Mile Creek Native Archaeological Complex, a native buffalo hunting and spiritual site. This site has yet to be developed or interpreted but has the potential to be a major native interpretive centre.

Tourism resources and services are concentrated in the smaller communities of Livingston, Mammoth and Corwin Springs. They include a variety of campgrounds, motels and hotels, two guest ranches, and one bed and breakfast. Livingston is a haven for outdoor enthusiasts offering many opportunities for hunting, fishing, rafting, backpacking, camping and skiing. In addition, both Gardner and Livingston host an annual rodeo.

Opportunities and Constraints

This segment could be a strong alternate route as it offers a variety of resources. Opportunities exist for trail development providing access to the less used portions of the wilderness, and for enhanced interpretation of the historic, cultural and natural features.

Constraints to development include inadequate funding and the location of some resources on private land.

Segment 29: Red Rock Lakes

Segment 29 extends approximately 31 miles (50 km) along Montana Highway 87 from its junction with U.S. Highway 287 at Cliff Lake, connecting with U.S. Highway 20 in Idaho, and travelling east to West Yellowstone.

This short loop segment offers some impressive scenery. Key resources include a wildlife refuge which supports an incredible and easily viewable range of wildlife. Cultural/historic and tourism resources are limited.

Significant Themes and Resources

The relevant themes along this segment pertain to the natural resource base. They include wetlands and the Yellowstone Rockies. The only significant resource is the Red Rock Lakes National Wildlife Refuge considered one of North America's most important nesting and wintering areas for trumpeter swans as well as other wildfowl. Tourism resources and services are undeveloped as the route traverses through a wilderness area. The only known resources are three small campgrounds located in the area of the refuge.

Opportunities and Constraints

This segment offers a scenic alternative to U.S. 287 or Route Segment 9 and provides outstanding wildlife viewing. While there is an opportunity to further promote this area, every attempt should be made to enhance the protection of this region. Appropriate tourism development could involve the provision of guided tour buses into the refuge.

One major constraint is the closure of the refuge from fall to mid-summer, hence this loop would be seasonal in nature. As well, a dusty gravel road leading into the refuge is considered an impediment. There is an opportunity to upgrade this access road, but any upgrading must be sensitive to the environment.

Segment 30: Mammoth-Red Lodge

Segment 30 extends for approximately 47 miles (76 km) through Yellowstone Park from East Mammoth Hot Springs to Red Lodge. This route could be a loop to a main route. It is considered one of the most spectacular sections of highway in the Trail of the Great Bear study area, traversing both the Beartooth Pass (also known as U.S. Highway 212) and the Chief Joseph Scenic Highway. In addition, it provides access to Cody, a major gateway leading from Wyoming into Yellowstone National Park.

Significant Themes and Resources

Common themes include the Yellowstone Rockies, coal mining and traditional native culture and land-use history. Resources along this segment are very distinct. The Beartooth Scenic Highway is considered one of America's most scenic drives. As well, this segment also traverses the Chief Joseph Scenic Highway which winds through canyons and rugged mountains, and the Absaroka-Beartooth Wilderness. The Red Lodge Commercial Historic District contains many historic structures and buildings but remains relatively undeveloped and uninterpreted.

Tourism resources and services, concentrated in the small communities of Red Lodge and Cody, are relatively limited including four campgrounds and seven hotels and motels. Red Lodge is a four season resort town, offering snowmobiling and downhill and cross country skiing in the winter, and fishing and boating in the summer. In addition, special events are held annually in both Cody and Red Lodge. Red Lodge hosts a Festival of Nations which highlights the customs of many nationalities as well as a winter carnival in March.

Opportunities and Constraints

This segment provides an excellent opportunity for the Trail of the Great Bear to gain increased exposure and offers four season recreational activities. The Buffalo Bill Historic Centre in Cody, although outside the study area, could be an excellent location for marketing and promoting the corridor, since this centre is a destination point for many European and other international visitors. There are also opportunities for enhanced interpretive development of specific natural and cultural features.

A constraint to development and to visitation along this segment is the closure of the Beartooth Scenic Highway between October and June.

Segment 31: Highway 2, Missouri Headwaters Three Forks

Segment 31 extends for approximately 23 miles (37 km) along U.S. Highway 287 through Three Forks to the Missouri Headwaters. This route provides access to a primary resource, the Missouri Headwaters State Park.

Significant Themes and Resources

Relevant themes pertain to the historical and cultural resources in the area including native chert mining and the non-native exploration and fur trade.

Key resources include Three Waters Quarries, a traditional native chert mine, and Three Forks National Historic Landmark which marks a rendezvous point and shared hunting grounds for Native tribes. Both of these resources are in need of enhanced interpretation and development. Another major resource is the Missouri Headwaters State Park which offers numerous recreational opportunities. Tourism resources are limited to four campgrounds, four hotels and motels, a nine hole golf course, and an annual rodeo in Three Forks. As well, Missouri Headwaters State Park offers picnic areas, boating and fishing.

Opportunities and Constraints

The potential exists to further promote and enhance interpretation of the resources in the State Park. As well, there is an opportunity to develop trails to allow for wildlife viewing, a key component of the Trail of the Great Bear concept. No constraints have been identified. This segment provides a good opportunity to divert traffic from heavily used roadways in the area.

Segment 32: Sun River Game Reserve

This segment extends for approximately 50 miles (80 km) southwest of Choteau and then returns east to U.S. Highway 287 at Augusta. The entire route is an improved gravel road. The route is very scenic and passes primarily through wilderness areas. Both the Bob Marshall Wilderness Complex and Sun River Game Reserve are key features. This route provides a scenic loop off a main corridor and provides for ample wildlife viewing.

Significant Themes and Resources

Themes along this segment relate to the natural environment and include the Rocky Mountain Front and large mammals. Key resource includes the Sun River Wildlife Management Area which supports large populations of elk, bighorn sheep, mountain goats and deer. As well, the Bob Marshall Wilderness Complex contains significant populations of birds, wildlife as well as unique scenic features. Tourism services/resources are limited to five campgrounds.

Opportunities and Constraints

This loop provides additional wildlife viewing opportunities. There is potential to enhance visitor awareness of the sensitivity of the natural resources. Constraints relate to the gravel road and limited services which could impede visitors to the area. Also, the location of some wilderness areas on private land could negatively impact protection and interpretation of specific resources.

Segment 33: Pine Butte & Teton Marsh

Segment 33 extends for approximately 25 miles (40 km) west of U.S. Highway 89, north of Choteau on an improved road. It parallels the Teton River until it reaches the Lewis and Clark National Forest. The route traverses some very scenic and diverse wildland areas.

Significant Themes and Resources

The most significant theme in this area relates to the front ranges of the Northern Rockies. Key resources include the Pine Butte/Teton Marsh and the Ear Mountain Nature Conservancy, two areas with very diverse and productive wildlife habitats year round. In addition, a variety of bird watching and big game viewing opportunities exist. The Teton Marsh is prime habitat for grizzly bears. There are no developed historic and cultural sites, however, excellent potential exists for native site and traditional land use interpretation. Tourism resources and services are limited to two campgrounds and some recreational activities including cross country skiing, hiking and one small downhill ski area.

Opportunities and Constraints

Some opportunities include enhanced promotion and interpretation of wildlands/wildlife features and increased protection of these areas. This segment also has potential to disperse traffic from a main route to less heavily used areas.

Segment 34: Westcastle

This segment extends for approximately 50 km (31 miles) south and east from Hillcrest Mines on Highway 774 to the junction with Highway 507. It follows Highway 507 east to Pincher Creek.

Significant Themes and Resources

The theme base for this segment includes natural resources such as foothills, large mammals and the Northern Rockies. The most significant resources are Beauvais Lake Provincial Park which provides key elk and mule deer habitat; and Southcastle wildland area which has impressive mountain scenery with a wide variety of geological formations and habitats.

Tourism resources are dispersed along the route, at Westcastle and in the area near Pincher Creek. Accommodations include eight campgrounds and one guest ranch. A regional ski area is situated at Westcastle.

Opportunities and Constraints

Recreational opportunities are key along this segment. The key resource includes the natural wildlands, providing the visitor with a backcountry experience. However, the wildlands currently remain unprotected and as such proper steps must be taken to preserve the key natural features along this segment. This could include the development of trails to contain people in designated areas and the implementation of signage to increase the public's awareness of the fragility of these sites. The proposed upgrading and expansion of the Westcastle ski area could enhance the ability of the Trail to visitors on a four season basis.

Segment 35: Fort Macleod - Lethbridge

This segment extends for approximately 31 miles (50 km) from Fort Macleod east along Highway 3 to the city of Lethbridge. Fort Macleod resources are presented in Route Segment 13. The route traverses intensively farmed flat land, although there are occasional overviews of the Oldman River. There are some limited but significant geological sections along the valley walls and some important river valley habitats at each end of this segment. This short segment possesses some interesting cultural and historic resources which focus around the Whiskey Trade and Native Spiritual activities. Lethbridge is a major tourism service node and gateway. Services are also concentrated in Fort Macleod with limited services in the smaller communities of Monarch, Kipp and Coalhurst. The route offers a direct linkage between the centres of Fort Macleod and Lethbridge.

Significant Themes and Resources

This route segment contains some resources representing cultural and natural history themes. Natural history themes include riparian habitats and glacial megablocks. Cultural history themes include the whiskey trade, military and police "Law and Order," native spirituality, traditional culture and land use history, and transportation-railroads.

The riparian habitats in the vicinity of Fort Macleod include some of Canada's most extensive cottonwood, shrubbery and back channel wetland habitats. There are scattered geological features of interest including a glacial megablock, and a large piece of bedrock (up to 4 km long) which was lifted and moved during glaciation. There is some interpretation of the region's natural history at the Helen Schuler Centre and Nature Reserve, in Lethbridge.

Cultural themes are represented at the undeveloped Conrad's whiskey post on the Blood Reserve, and the Fort Whoop-Up restoration, Indian Battle, Canadian Pacific High Level Bridge, and the Sir Alexander Galt Museum and Archives in Lethbridge.

Tourism services and facilities are concentrated in Lethbridge. Services are also available in Fort Macleod with limited services available in the small communities of Monarch, Kipp and Coalhurst.

Opportunities and Constraints

In this segment there are limited opportunities with respect to the principal Trail of the Great Bear themes although Lethbridge has resources which complement the Trail of the Great Bear. There is considerable private land and limited access to key resources. Lethbridge is a logical gateway and major service node for travellers entering the Trail of the Great Bear and arriving by air.

Development or upgrading of interpretive trails in riparian habitats at Fort Macleod and signage at pulloffs on Highway 3 to interpret geological features would enhance the visitor's experience. A protective land use bylaw as well as interpretive signage and restoration at Conrad's Post and enhancement of Fort Whoop-up are also needed. Clearer differentiation of the Galt Museum and Archives from other small museums would increase tourist interest.

Conclusion

Overall, the study area contains many route segments with excellent resources, both in terms of quantity and quality, which support and maintain the integrity of the Trail of the Great Bear concept. They include natural, historical, cultural and tourism resources.

Some route segments are not, and cannot be, open year round, but in each case interesting alternative routes exist which, with some interpretation, development or upgrading of services, could be enhanced to become very desirable loops or tours themselves.

Most route segments provide excellent potential for wildlife and wildland, historical, and cultural interpretation and educational tourism. In some cases further formal protection of lands will be necessary to preserve the resources and ensure that they will remain available for the longer term.

In selecting the route segments careful consideration was given to ensure whenever possible that services and tourism nodes were no more than 100 miles or 160 kilometres apart. Also, resulting route segments for the Trail of the Great Bear are accessible at several points by major gateways with scheduled flights, including Calgary, Lethbridge, Helena, Great Falls, Bozeman, Butte, Missoula and Kalispell. West Yellowstone has a fully developed airport serviced by charter flights, and seasonal scheduled flights. The Trail of the Great Bear can be accessed at numerous points along its route, allowing it to be travelled either in its entirety or in individual or groups of segments, broadening its appeal to a larger number of markets.

Many man-made attractions and recreational facilities are located along or close to the study area which can also broaden the appeal of the Trail to other markets and which provide four season tourism demand potential. Most notable are the skiing resorts of Banff and Kananaskis Country in Alberta and Big Sky and Whitefish in Montana. Numerous golf courses are also available, from championship to small local facilities. Montana has many areas with hot springs and pools, some of which are undeveloped. Both Alberta and Montana have prime trout fishing streams, these streams have been categorized in Montana, and the best have been designated as blue-ribbon streams.

Opportunities exist for the development of a variety of tourism services. These include improvement of highway signs, interpretive signs, guided tours, upgrading of historical and cultural resources to create points of interest, protection of lands to maintain the resources, development of better tourism services at tour nodes, guest ranch or cabin type accommodation and guiding facilities, outfitting services and, in most developed areas, the creation of full service tourism destinations.

3.2.5 Other Route Segments

A total of 16 potential route segments were not reviewed in detail due to limited significant natural or cultural/historic resources and/or because adjacent segments were overwhelmingly rich in resources. These route segments follow:

OTHER ROUTE SEGMENTS

Alberta

Highway 2:	Calgary to Claresholm
Highway 1:	Calgary to Highway 22
Highway 2:	Fort Macleod to Cardston

Montana

U.S. Highway 2:	Browning to Cutbank
Secondary Route 279:	Montana Highway 200 to Helena
Montana Highway 200:	U.S. Highway 89 west to Montana Highway 141
Secondary Route 434:	Montana Highway 200 to Wolf Creek
Interstate 90:	Missoula to Drummond
Interstate 90:	Anaconda to Garrison
Interstate 15:	Boulder to Butte
Montana Highway 2:	Whitehall to Butte
U.S. Highways 12 & 287:	Helena to Three Forks
Secondary Route 359:	Montana Highway 2 to U.S. Highway 287 (Jefferson Island to Pony)
Interstate 90:	Montana Highway 69 to Bozeman
U.S. Highway 191:	Bozeman to U.S. Highway 287 Junction
U.S. Highways 287 & 41:	Virginia City to Whitehall

A brief description of these route segments is included in Appendix VII.

3.2.6 External Gateways

Three major gateways, the city of Calgary, the town of Banff (located in Banff National Park) and Yellowstone National Park, do not fall within the route segments previously described. Calgary is a major access and transition point into the proposed corridor. It offers a concentration of significant visitor services including a major international airport and transportation facilities. Banff and Yellowstone are major tourist destinations offering a concentration of significant visitor services and resources. Banff is located at the northern tip of the study area and Yellowstone is located at the southern tip of the study area.

Calgary

Calgary is a major urban centre through which the Trans-Canada Highway passes 130 km east of Banff National Park. Calgary's proximity to the Rocky Mountains makes the city both a prime tourist destination and a major gateway. A strong western influence is prevalent in the city with oil & gas, agricultural and ranching still playing major roles in the economy.

The city itself possesses a variety of well developed and well promoted resources. Some of the more significant and relevant ones include the Bow River, one of the North America's finest trout fisheries; Fish Creek Provincial Park which contains a number of small winter bison kills; and the Glenbow Museum and Archives, an international museum which holds the largest collection of Blackfoot ethnographic materials in Canada.

In addition, Calgary possesses numerous art galleries and hosts many live theatre performances. Numerous four season recreational activities can be carried out in the vicinity of the city including golfing, cycling, fishing, cross country and downhill skiing at Canada Olympic Park. Calgary also has an airport with direct national and international connections.

Accommodation ranges from first-class hotel properties to smaller budget chains. Calgary has rather sophisticated dining districts offering a range of international cuisines. Shopping opportunities include boutiques, department stores and specialty shops.

Calgary's role as a major gateway and its thematic links with the Trail of the Great Bear are of great relevance to this study.

Banff National Park

Banff, established in 1885 and located 130 km west of Calgary is Canada's oldest national park. Banff enjoys an international reputation and draws visitors from around the world. Its major attractions are the impressive Rocky Mountains with spectacular views towards Mt. Rundle, Castle Mountain, and Mount Cascade. As well, Banff is considered a wildlife refuge with abundant habitat of elk, deer, bighorn sheep and bears.

Historical/cultural resources include the Vermillion Lakes native campsites, a rich and very significant record of native occupation; the Cave and Basin Centennial Centre; and the Banff Springs Hotel, an internationally recognized hotel built in the grand manner of the European resorts. In addition, Banff hosts numerous special events, including the Banff Festival of Arts held in the summertime. Banff offers a wide range of quality accommodation and foodservice establishments. Recreational facilities are considered world class. These include an 18 hole and nine hole golf course, numerous hiking trails, fishing, horseback riding, cross country and downhill skiing. Banff is a major component of the Trail of the Great Bear concept. It will act as a major entry and exit point onto the Trail of the Great Bear as well as providing linkages with the themes associated with the scenic corridor.

Yellowstone National Park

Yellowstone is primarily located in the northwest corner of Wyoming, with a small sliver of land in Idaho and a large border strip in Montana. It was the first national park designated in the world, becoming a park in 1872. Yellowstone enjoys an international reputation and draws visitors from around the world.

Its major attractions are the mountains, alpine meadows, spectacular waterfalls, deep canyons and magnificent thermal features, including "Old Faithful". It is also abundant with wildlife including bears, bison, deer, elk, bald eagles, trumpeter swans and a variety of songbirds.

Yellowstone offers a wide range of roofed accommodation and campgrounds and food service facilities, however, most are seasonal operations with limited winter operation. Recreation activities include scenic boat rides, motorcoach tours, horseback riding, hiking and crosscountry skiing.

Cultural and historic resources include, Old Faithful Inn, built in 1903-1904, the Lake Hotel built in 1889 and historical records relating to the exploration, fur trade, prospecting and mining and the early development of the park in the years before the turn of the century. Yellowstone also has a rich and highly significant record of native occupation and use extending back over 10,000 years.

Yellowstone is a major component of the Trail of the Great Bear concept. It will act as a major entry and exit point onto the Trail as well as providing linkages with the themes associated with the scenic corridor.

3.3 POLICIES AND BYLAWS

3.3.1 Introduction

The purpose of the research for this section was to broadly identify and assess major constraints, conflicts and enhancements to the designation and implementation of the proposed Trail of the Great Bear.

Numerous agencies were contacted for both Alberta and Montana with areas of responsibility including transportation, forestry, parks, culture, recreation and tourism.

Throughout the study area there are exceptional but sensitive areas and resources, which if left unprotected could reduce the attractiveness and integrity of the Trail of the Great Bear. For this reason, it may be desirable in future, to further assess these areas and where required investigate means for protection and identify appropriate resource management techniques.

Table III-3 identifies the relevant policies/regulations, the agency involved and the implications to the Trail, for Alberta and Montana.

TABLE III-3

KEY ALBERTA POLICIES AND REGULATIONS

Agency	Policy/Regulation	Implication to the Trail of the Great Bear
Canadian Parks Service	Separate management plans are in effect for each park.	Any development within the park must be endorsed by the park management plan.
	Promotional signs are prohibited.	Trailblazer signs would not be allowed in the park.
	Park superintendents may prohibit the posting or distribution of promotional material in the park.	Private businesses operating in the park may have to provide an alternative for promotion and distribution of Trail material.
Alberta Transportation and Utilities	No formal policies exist regarding the designation of highways, communities along the route must support and request the designation.	There are no guidelines to follow.
	Designation means special signs would be provided and identification provided on Alberta map.	Significant promotional items (signs, map identification) for the Trail would be available once designated.
	Paving of current gravel section of Highway 22 scheduled for completion in 1992.	By 1992 all sections of the Trail will be on paved roads.
	Designated highways already exist in Alberta.	Support for designated highways. However, Alberta Transportation and Utilities will not usually double designate any highway and some portions of the Trail are already designated.
Alberta Forestry, Lands and Wildlife	Timber harvesting is an ongoing activity on crown lands in the vicinity of the Trail, visual aesthetics taken into consideration.	Careful monitoring will need to continue to ensure visual aesthetics are taken into consideration.
	The Trail does cross various lands zoned for different uses.	Any promotion done will have to take into consideration the zoned land use of the area.

TABLE III-3 continued

Agency	Policy/Regulation	Implication to the Trail of the Great Bear
Alberta Recreation and Parks	Two acts are used for guidance; Provincial Parks Act and Wilderness Areas, Ecological Reserves and Natural Areas Act.	The acts are supportive of the concept of sustainable tourism and provide instruments to protect Alberta's parks and wilderness.
	Highway 40 experiences seasonal closure from December 1 to June 15.	This must be a seasonal alternate route and must be identified as such in promotional material.
	The intentions for establishing Kananaskis Country and policies thereof, were compiled with Alberta residents as the primary market.	Existing policies may not be sufficient to deal with tourism drawn from a wider base.
Customs Canada	Border crossings have restricted and seasonal operating hours.	Hours of operation and alternative crossings must be identified in promotional material.
	Canadian residents are prohibited from driving U.S. registered vehicles in Canada.	This is a major hurdle which will adversely affect the Canadian fly/drive market.
Alberta Culture and Multiculturalism	The Historical Resources Act empowers the Minister to place markers, cairns, signs or other interpretive facilities in any suitable location.	Trail of the Great Bear may be able to obtain support in sign placement and/or interpretive facilities.
	The same Act empowers designation of historic resources by the Minister as well as by municipal councils.	Could enhance the cultural and historic elements of the Trail and ensure their protection.
	There is provision to provide assistance, advice, training to individuals and organizations with aims and objectives similar to the Department.	Could be an excellent support service to the Trail.
Regional Planning Commissions	The plans address land use and future goals for much of the area of the Trail in Alberta.	Outline policies which in general terms are supportive of the Trail of the Great Bear concept.

TABLE III-3 continued

KEY MONTANA POLICIES AND REGULATIONS

Agency	Policy/Regulation	Implication to the Trail of the Great Bear
Federal Scenic Road Programs	The United States Federal Government contributes to the overall development of scenic roads programs.	By working with the U.S. Department of Interior, U.S. Department of Agriculture and the U.S. Department of Transportation, the Trail can avail itself to all of the Federal support accessible.
	A Scenic Byways Study is currently being conducted addressing the safety, environment and economic impact of Scenic byways.	The establishment of a National Scenic Byways program, if passed by Congress in the fall of 1990, should provide valuable support services.
United States Forest Service (USFS)	Any projects proposed for development on USFS administered lands must be analyzed under the National Environmental Policy Act (NEPA).	Consideration to the NEPA process must be given to avoid delays or revisions to the implementation process.
	Each National Forest has its own public access plan and map, usually updated annually in a public involvement process.	At present, none of the forest districts concerned have restricted public access to the lands.
	There are timber sale areas administered by USFS in the region of the Trail, aesthetics are taken into consideration when selling timber.	Continued monitoring of visual aesthetics should be done by the Trail organization.
	The USFS is involved in its own scenic byways program, National Forest Scenic Byways and funds their signs.	Funding for signs and other required improvements in areas administered by the USFS may be available from the Department.
Department of Fish, Wildlife and Parks	Distribution of promotional material could be done in coordination with the Department of Fish, Wildlife and Parks and the Department of Commerce.	The Trail could work in conjunction with these Departments on promotional items.

TABLE III-3 continued

Agency	Policy/Regulation	Implication to the Trail of the Great Bear
Montana State Parks	Some parks are currently experiencing over crowding.	Trail must encourage shoulder season use.
	Some wildlife habitat areas have restricted access and seasonal closures.	There may be some limitations in promoting all areas for four season utilization.
	State Parks System in poor condition and largely undeveloped.	Increased tourism through the Trail may enable the State Parks System to obtain additional funds.
	Need for more adequate highway signs.	The Trail should work in conjunction with Montana State Parks when signs are addressed.
Bureau of Land Management (BLM)	The BLM considers all types of applications for funds including signs, promotional publications, upgrading and development of recreation areas.	The BLM has the potential to become a great supporter of the Trail both from a philosophical perspective and financially.
	The BLM is currently involved in National Backcountry Byways.	Their experience in National Backcountry Byways could prove very valuable towards the implementation and promotion of the Trail.
The National Parks Service	Signs and distribution of commercial material within the parks are strictly controlled.	Promotional material for the Trail distributed in the parks could not contain any advertising. Trail of the Great Bear signs would not be permitted.
	National Parks are regulated by the Management Policies, U.S. Department of the Interior National Park Service 1988, Chapter 8. Each park has its own management objectives.	Certain types of promotional activity for the Trail may be approved.
	The Going-to-the-Sun Road in Glacier National Park has vehicle length restrictions and experiences seasonal closures.	Vehicle length restrictions and seasonal closure information must be included in promotional material.

TABLE III-3 continued

Agency	Policy/Regulation	Implication to the Trail of the Great Bear
Montana Department of Highways	Signs are controlled by the Traffic Engineering Section, funding for non-traffic related signs and their maintenance would not be available from the Department. The Department also does not endorse the use of highway funds for facilities such as pull outs.	The Department would participate in the determination of sign standards and placement but not financially. Funding would also have to be found for the development of pull outs and related maintenance.
	The section of MT49 between Kiowa and East Glacier experiences closures during the winter due to weather conditions.	A seasonal alternate route must be provided.
United States Bureau of Customs	Border crossings have restricted and seasonal operating hours.	Hours of operation and alternate crossings must be identified.
	U.S. residents are permitted to drive Canadian registered rental vehicles for pleasure in the United States.	This is supportive to encouraging the U.S. fly/drive market.

Source: Pannell Kerr Forster research

3.4 MARKET ASSESSMENT

3.4.1 Introduction

The purpose of this section is to highlight some of the key findings from the detailed market research which was conducted in two phases as follows:

- Determination of past and existing markets utilizing the corridor area, and

- Determination of potential future markets for the proposed corridor area.

The types of information utilized for the research consist of both primary and secondary sources. The major secondary sources of information used include:

- The 1982 Alberta Travel Survey
- The 1986, 1988 Canadian Travel Survey
- Statistics Canada
- Travel Markets to North America - 1989 Highlights Report
- 1990 Outlook for Travel & Tourism
- The 1988 Montana Travel Survey
- Rocky Mountain National Parks Utilization Study (1989)

In addition, the consultants utilized published reports and statistics available from existing jurisdictions and national parks.

In order to identify potential markets for the proposed corridor, interviews were conducted with a network of regional, national and international wholesalers, tour operators, international carriers and various associations as follows:

- International tour wholesalers with in-bound travel from Europe, Japan, and the United States
- Major international carriers
- Recreation Vehicle associations

- Tour operators
    - adventure/wilderness travel
    - motor coach tours
- Car rental agencies
- Automobile associations

3.4.2 Analysis of Existing Tourism Markets

3.4.2.1 Introduction

The objective of this section is to examine the size and character of the tourist markets currently visiting the province of Alberta and the state of Montana. Visitation to key areas along the proposed corridor will also be highlighted including:

- Banff National Park;
- Waterton National Park;
- Glacier National Park;
- Yellowstone National Park.

Assessing the visitation to these areas by reviewing secondary sources will allow for more detailed information concerning the market segments. As a result, comparisons can be made with the larger Alberta and Montana markets. This will enable a determination of:

- where opportunities for further market expansion exist;
- where increased economic benefits are possible from existing travel markets; and
- where requirements of the market should be the focus of marketing, programming and product development.

The existing information provides some understanding of current tourism markets to both Alberta and Montana. However, some gaps in the market information presented in this section exist and have been noted as such in appropriate areas.

3.4.2.2 Alberta Tourism Market Characteristics

This section provides a general understanding of the tourist markets in Alberta. The key zones to be included are Zone 1, Chinook Country, and Zone 10, Calgary and District. The market characteristics for tourism in Alberta are described in terms of the following criteria:

- volume of visitation
- origin and length of stay
- seasonality
- demographic and socio-economic profiles
- primary destinations/trip purpose
- activity participation
- visitor expenditures
- mode of transportation.

The key findings in terms of visitation to the province of Alberta and the region are as follows:

- Alberta attracted an estimated 13.8 million person trips during 1988, a 3.1% increase over 1986.

- Resident travel to Zone 1 and Zone 10 (Southern Alberta) has increased in 1988 over 1986 (zone 1 - 7.5% increase; zone 10 -29.9% increase).

- Calgary captured 1.1 million non-resident visitors compared to Chinook Country which captured close to .5 million non-residents.

- Of the total visitation to Alberta, 69% of visitors originate from within Alberta.

- Non-resident visitors originate primarily from British Columbia, Saskatchewan and the United States.

- Overseas visitation to Alberta represents 3.1% of the total travel market. The top three countries of origin include the United Kingdom, Japan and Germany.

- Albertans have the lowest length of stay in the province (2.5 nights).

- Other Canada, United States and overseas markets average between 3.5 and 13.2 nights in the province.

- The majority (more than half) of all travel to the province occurs during the summer months.

- Travellers to Alberta are dominated by family groups. Approximately one half of all visitors to the province fall between the ages of 20-49, have some post secondary education, and earn incomes of $40,000 Canadian or more.

- In 1982, Zone 10, (Calgary and District), was the most popular primary destination by non-residents, followed closely by Banff and Zone 1, (Chinook Country).

- The primary trip purpose of travellers to the province is for vacation.

- Predominant activities participated in include visiting friends and relatives, shopping and sightseeing.

- Non-resident visitors to Alberta in 1982 spent an average of $295.00 Canadian per household party in Alberta. Expenditures per household party in Zone 10 were higher than in Zone 1.

- Alberta's tourism market travels primarily by automobile. Bus travel is a relatively strong influence at 7% for Alberta, 9% for Zone 10 and 5% for Zone 1. Calgary clearly has a higher propensity for motorcoach tours, given that it is the gateway city to the mountains.

(Source: 1982 Alberta Travel Survey; 1988 Canadian Travel Survey)

Table III-4 demonstrates that tourism to Alberta has increased continually since 1982, with the 1989 estimated visitation to Alberta at 14 million person trips. Alberta residents account for the largest market share (68.8%), followed by other Canadians (18.8%), Americans (9.2%) and overseas visitors (3.1%).

TABLE III-4
NUMBER OF PERSON-TRIPS TO ALBERTA STAYING ONE NIGHT OR MORE
(000'S)

Visitor Origin	1982	1984	1986	1988	1989 (Est.)	% of Total Market
Albertans	8,580	7,916	9,172	9,634	9,644	(68.8%)
Other Canadians	2,282	2,236	2,571	2,544	2,645	(18.8%)
U.S.A.	937	944	1,362	1,223	1,296	(9.3%)
Overseas	256	241	282	399	435	(3.1%)
Total	12,056	11,338	13,388	13,802	14,022	(100%)
% Change From Previous Year	-	-6.0	+18.1	+3.1	+1.6	

Source: Alberta Tourism; Statistics Canada

3.4.2.3 Montana Tourism Market Characteristics

This section summarizes the characteristics of visitors to the state of Montana. Information for visitors to the State are based on non-resident visitation only and derived from the 1988 Montana Travel Survey and an economic report titled "Non-Resident Travel in Montana - 1988".

The key findings in terms of visitation to the state of Montana are as follows:

- Montana attracted approximately 5.1 million non-resident person visits during the 1988/89 period.
- Visitors originate from the Pacific, Montana and North Central states, with California and Washington dominating.
- Albertans comprise 40% of the Canadian visitation to the state.
- International markets originate mainly from Germany and the United Kingdom, with emerging markets from Taiwan and Japan.
- Highway travellers to Montana are typically older - 50% are over 50 years of age.
- The length of stay in Montana varies by mode of transport and by season;
  - air travellers average 6.4 days (summer), 6 - 9 days (fall), 4.5 days (spring), 4.0 days (winter).
  - highway travellers average 3.2 days (summer), 3.4 days (fall), 2.9 days (spring), 2.9 days (winter).
- The most popular destinations sought in Montana are Yellowstone and Glacier National Parks.
- Visitors come to Montana seeking wilderness, scenic features and recreational opportunities.
- The main activities pursued in Montana include:
  - photography
  - visiting historic sites

  - viewing wildlife
  - auto/R.V. camping.

- The average expenditure per day for highway summer travellers is $63.13 U.S. per party.

Table III-5 reveals that the surrounding American states provide many visitors to Montana, especially the Pacific Coast States (31%). Canadian tourists comprise 8% of visitation, while "other" markets, such as international tourists and other states, represent the remaining 19%.

TABLE III-5

VISITORS TO MONTANA

REGION	PERCENTAGE
Pacific Coast States	31%
Mountain States	21%
North Central States	21%
Canada	8%
Other	19%
	100%

Source: 1988 Montana Travel Survey

3.4.2.4 National Park Market Characteristics

This section highlights the overall characteristics of visitors to the national parks located within the Trail of the Great Bear. These include:

- Banff National Park
- Waterton Lakes National Park
- Yellowstone and Glacier National Parks

Banff National Park

Banff National Park is a major gateway for Trail of the Great Bear. It is an international destination area and contains some of the most spectacular scenery in the world. Because of Banff's uniqueness as a tourism destination, the tourism markets have been examined independently. Information on tourism visitation to Banff was derived from the Rocky Mountain National Parks Utilization Study, released in 1989. Other major secondary sources relied upon include:

- The 1982 Alberta Travel Survey;
- The 1988 Canadian Travel Survey;
- The 1988/89 Banff Chamber of Commerce Marketing Plan;
- Alberta Tourism Pulse, 1989/1990 issues.

Summary of Visitation to Banff National Park

The following points summarize visitation to Banff:

- Visitation to the park (person visits) has received marginal growth since 1983.

- Although Banff receives the majority of visitation in the summer months, the winter is the most frequented time for resident Albertans.

- Shoulder season travel consists mainly of conferences and conventions to the park.

- Visitation to Banff is expected to increase in the future due to marketing campaigns initiated by the provincial and federal governments. To handle the increased visitation, the park will need to promote off season tourism.

- The primary market for Banff is Albertan visitors, followed by other Canadians.

- The most important foreign market to Banff is the United States (32% of non-resident visitors are American).

- The overseas markets yield about one quarter million visitors to the Rocky Mountain National Parks and represent an estimated 8% of visitors to Banff National Park.
- A typical Banff visitor represents an affluent individual between the ages of 25 and 44 years of age.
- Winter visitors to Banff tend to be much younger than summer visitors.
- Pleasure travel is the primary trip purpose to Banff.
- The main activities participated in Banff include sightseeing and viewing wildlife, followed by shopping and photography. Winter activities include skiing, snowmobiling, and skating.
- Day visitors to the park spend an average of $20 (Cdn.), whereas overnight visitors spend $74 (Cdn.) on average.
- 93% of all Banff park visitors arrive by private vehicle.
- Charter bus visitors represent 6% of the total visitation. Approximately 4,606 charter buses travelled to the park between June 1987 and June 1988.
- An estimated 1.2 million downhill skiers visit major Alberta ski resorts annually; the number of overnight stays is not available.

Waterton Lakes National Park

Waterton Lakes National Park is located within the boundaries of the Canadian/United States border and represents a major linkage point for the proposed corridor. Information pertaining to the park visitor characteristics was derived from the Waterton Tourism Study completed in 1988, and revised in 1989.

Note: Person visits refer to all visits, including repeat visits by the same individuals.

Summary of Visitation to Waterton National Park

A summary of visitation to Waterton Lakes National Park follows:

- Visitation (person visits) in the park has decreased by 9.8% between 1980 and 1988, but increased by 11% from 1988 to 1989.
- Visitation (person visits) to the park averages 605,000 visits each year, with the majority of visitation in the summer months (87% of non-resident visits).
- Overall, southern Alberta is the most significant existing market for Waterton Lakes National Park representing 35% of the visitations. Americans comprise 34% of all visitors with California, Montana and the northwestern States representing the most significant markets.
- Albertans represent the prime market in the winter season (89% of visitations), and approximately 72% of winter visitors are day trippers.
- International visitors comprise only 3% of the existing market.
- The Waterton visitor is typically well educated with higher than average personal and household income. Family and relatives travelling together are the most significant travel party visiting Waterton Lakes National Park. Couples are the second most significant travel party, especially in the fall.
- The most popular visitor activities in the park include sightseeing by car and walking. Other significant activities include: wildlife viewing, photography, shopping, resting/relaxing, restaurant dining, vegetation/flora viewing and visiting Glacier National Park in the United States.

- During November 1, 1986 through October 31, 1987, there were an estimated 325,338 visitors by private automobile that expended an estimated $8.9 million (Cdn.) in the park. Average expenditures over an annual period were $27.32 (Cdn.) per person.

- The primary mode of transportation to the park is via private auto. Approximately 4% of visitors arrive via motorcoach.

Glacier and Yellowstone National Parks

Both Glacier and Yellowstone National Park are service centres or gateways within the Montana portion of the proposed corridor. Yellowstone acts as the major gateway for the Trail at the southeastern end, whereas Glacier National Park acts as a service centre at the mid point of the Trail of the Great Bear. Limited data exists on visitation to Glacier National Park. As such, the information that is available has been combined with that of Yellowstone. Information on tourism visitation to Yellowstone National Park was derived from the "Visitor Services Project" report. The study describes the results of a visitor study at Yellowstone National Park conducted in July, 1987.

Summary of Visitation to Glacier and Yellowstone National Parks

The following points summarize visitation to the two national parks.

- Visitation to both Yellowstone and Glacier National Parks in terms of person trips has increased overall since 1986.

- Visitors to Yellowstone National Park originate mainly from the Pacific and Northwest States (42% of U.S. visitors).

- Only 8% of visitors are international; most originate from Canada, Germany and Switzerland.

- Approximately 60% of visitors stay in the park for at least 2 days.

- Visitors to Yellowstone Park travel primarily in family groups (75% of visitors).
- Wyoming (43%) and Montana (27%) are primary destinations of visitors after leaving Yellowstone National Park.
- Walking for pleasure and visiting museums or the visitor centre are the primary activities pursued by the majority of visitors to Yellowstone National Park.
- Visitors spend an average of $51.00 (U.S.) per trip during their visit to the park.

Overall Visitations to National Parks

An overview of visitation figures to the major national parks along the proposed corridor in Table III-6 reveals that Banff National Park is the prime generator in terms of existing visitation, with Yellowstone and Glacier National Parks following close behind. Although Banff National Park experienced a 7.5 percent increase in visitation from 1988 to 1989, Yellowstone National Park clearly shows the largest increase in visitation - 21.2% from 1988 to 1989. The 1988 figures for Yellowstone, however, were abnormally low due to a forest fire that summer.

It should be noted that visitation figures refer to "person visits" which include all visits to the park, including repeat visits by the same individuals.

TABLE III-6

VISITATION TO NATIONAL PARKS - 1988/1989

NATIONAL PARK	VISITATION (PERSON VISITS)		
	1988	1989	% Change
Banff National Park	3,740,200	4,020,600	+7.5
Waterton Lakes National Park	605,000	N/A*	--
Yellowstone National Park	2,182,113	2,644,442	+21.2**
Glacier National Park	1,817,733	1,821,523	+0.2
Total Visitations	8,345,046	8,486,565	

Source: Institute of Tourism and Research, Montana
Environment Canada, Parks

* Note: 1989 figures not shown due to difference in data collection; visitation figures refer to person visits to the individual national parks.

** Note: 1988 figures for Yellowstone abnormally low due to forest fire that summer.

3.4.2.5 Implications of Existing Tourism Markets

The market research suggests that in terms of opportunities for further market expansion, the Trail of the Great Bear should focus marketing efforts on the non-resident markets in the long term since they will generate new revenues into the province/state. Although statistics reveal that resident markets represent the majority of existing visitations to the province/state, they have the lowest length of stay in both Alberta and Montana, and do not have expenditure rates as high as the non-resident markets (especially the overseas visitors). Alberta residents spend an average of 2.5 nights in the province while travelling, while other provincial visitors spend an average of 4.2 nights. It is recognized, however, that the resident travel market which is attracted to this corridor will stop tourism revenue leakages from outside the province/state and increase cross border visitations. These markets will also be important for the short term marketing of the concept.

The national parks act as prime tourism generators for the Trail in terms of existing visitations. However, the parks are currently operating at full capacity during the summer season and would not likely be able to handle the increased traffic flow from this touring route in the summer months. In order to increase the economic benefits from existing markets, the marketing strategy should focus on shifting existing markets along the Trail from the national parks to less utilized areas throughout Montana and Alberta within the corridor area.

Research strongly suggests that shoulder season travel should be emphasized to attract visitors in the spring, fall and winter, and to disperse the existing summer travel patterns (i.e. offer price differentials, specific tourism products in those seasons).

International travellers represent a strong market base for Banff and Yellowstone National Parks (represents 8% of visitors to each park respectively) and should continue to be targeted on a long term basis for the Trail of the Great Bear concept. The international market expenditures contribute to reduce the existing tourism balance of payments deficit for Canada and the United States, and represent a potential source of revenue for Alberta and Montana.

3.4.3 Analysis of Potential Tourism Markets

3.4.3.1 Introduction

In order to assess the key markets that are of importance for the Trail of the Great Bear concept, three overall markets were identified and segmented by:

- Geographic origin
- Trip purpose
- Mode of transportation

Within each of these market segments, a number of further delineated categories called sub-segments were identified and ranked in order of importance based on the following criteria:

- length of stay
- expenditures
- seasonality
- trip purpose

- origin
- size of the market
- mode of transport

3.4.3.2 Criteria Definition

Each of the above criteria were clearly defined relative to the concept for Trail of the Great Bear as follows.

1) Length of Stay

- The degree to which the duration of stay on vacation for the market segments impact their importance to the proposed concept.

2) Expenditures per Day

- The degree to which daily expenditures of each market generate potential economic benefits for Trail of the Great Bear (i.e. high expenditures are ranked high in terms of importance).

3) Origin

- The degree to which a traveller's origin will influence their likelihood of visiting the proposed scenic corridor.

4) Size of the Market

- The degree to which the size of the potential markets impact their importance to the concept (i.e. large markets ranked higher than small markets).

5) Seasonality

- The degree to which the usage by season for each market affects usage of the proposed concept.

6) Trip Purpose

- The degree to which the purpose of the vacation is consistent with the natural/historic and cultural resources of the proposed corridor.

7) Mode of Transport

- The degree to which the type of transportation used by the specific market is compatible with and accessible to the proposed corridor area.

3.4.3.3 Criteria Evaluation

To determine the most viable markets within each market segment (called sub-segments) for the proposed corridor, the criteria were ranked for each sub-segment. Each criterion was rated in order of importance to the Trail of the Great Bear concept on a scale ranging from 1 to 5, with one representing "extremely important" and five representing "not very important". The sum of the criteria was then calculated for each sub-segment to arrive at an overall ranking for each. The individual sub-segments were then categorized based on their overall ranking in order of importance.

The following example of a segmentation by trip purpose (Table III-7) illustrates the ranking procedure described to establish key overall potential markets for the Trail of the Great Bear. This methodology has been used in the past to determine the importance of market segments for various industry studies.

TABLE III-7

SEGMENTATION BY TRIP PURPOSE

CRITERIA	NATIONAL PARKS	ATTRACTIONS/ SPECIAL EVENTS	GROUP TOURING	SHORT GETAWAY	VISITING FRIENDS	SPECIAL INTEREST
Length of Stay	3	2	2	3	1	1
Expenditures	2	1	2	2	3	3
Origin	2	3	3	4	1	1
Size of Market	1	2	5	2	1	4
Seasonality	3	3	2	2	3	2
Trip Purpose	1	3	3	4	5	1
Mode of Transport	1	2	4	1	2	2
Total	13	16	21	18	16	14
Overall Rank	1	3	5	4	3	2

Source: Pannell Kerr Forster research

Based on this example, the key markets for the Trail of the Great Bear segmented by trip purpose would be as follows:

Sub-Segment	Overall Rank
National Parks	1
Special Interest Groups	2
Visiting Friends and Relatives	3
Attractions/Special Events	3
Short Getaway	4
Group Touring	5

3.4.3.4 Overview of the Market Segments

The market segments for Trail of the Great Bear have been presented in terms of both existing markets and potential markets by geographic origin. The existing markets by geographic origin are indicated in Table III-8 as follows:

TABLE III-8

EXISTING MARKET SEGMENTATION BY GEOGRAPHIC ORIGIN FOR PROPOSED CORRIDOR IN RANK ORDER*

Market Type	Alberta	Montana	Overall Rank
Primary	Alberta	Montana	1
	Montana	Alberta	1
	British Columbia	Pacific Coast	1
	Saskatchewan	Mountain States	1
		North Central States	1
Secondary	Other Canada	Other United States	2
	Other United States	Other Canada	2
Tertiary	Japan	United Kingdom	3
	United Kingdom	Germany	3
	Germany	Japan	3
	Other overseas	Other overseas	3

Source: Alberta Tourism; Travel Montana; Pannell Kerr Forster research

* The existing market segments were rank ordered in terms of the current size of the market visiting Alberta and Montana.

Primary markets include the strongest existing markets to the Trail of the Great Bear and to the province/state. These markets are represented by Alberta, Montana, British Columbia and Saskatchewan for the Alberta portion of the Trail. Secondary and tertiary markets include more long term markets for the corridor area such as other Canadian provinces, the United States and overseas countries.

The Montana portion of the Trail varies somewhat in terms of primary existing markets. The major focus of existing visitations is on the Montana resident market and the surrounding regions (i.e. Pacific Coast, Mountain, North Central) as well as the Alberta travellers to Montana. The secondary and tertiary markets include other Canada, other United States and overseas countries.

Potential Markets Segments

The potential market segments for Trail of the Great Bear are presented in Table III-9 as follows:

TABLE III-9

POTENTIAL MARKET SEGMENTATION BY GEOGRAPHIC ORIGIN FOR PROPOSED CORRIDOR

Market Type	Alberta	Montana	Overall Rank
Primary	Montana	Alberta	1
	British Columbia	Pacific Coast	1
	Saskatchewan	Mountain States	1
		North Central States	1
Secondary	Germany	Germany	2
	Japan	United Kingdom	2
	United Kingdom	Japan	2
Tertiary	Other Canada	Other United States	3
	Other United States	Other Canada	3
	Other Overseas	Other Overseas	3

Source: Pannell Kerr Forster research

Note: Primary potential markets refer to those with the strongest likelihood of visiting the Trail of the Great Bear, while secondary and tertiary markets offer long term potential visitations to the corridor area.

The potential market segments were evaluated based on a number of criteria including length of stay, expenditures, origin, size of the market, seasonality, trip purpose and mode of transport.

The identification of potential market segments has concentrated on the non-resident markets since they will generate new revenues into the province/state. The economic impact projections presented in Section 2.3 are, therefore, limited to visitors from outside Alberta and Montana.

An underlying assumption, based upon study research, has been that the concept will be developed over a long term. Selection of potential markets has, therefore, taken this long term growth into consideration. The overseas travellers represent strong potential markets for long term tourism benefits to the province/state.

It is recognized, however, that the resident travel market which is attracted to, and will travel within, the Trail of the Great Bear Corridor will assist in stopping tourism revenue leakages outside the province/state. They will also be important for initial/short term marketing of the concept. Increased cross border visitation between the province/state should also occur with implementation of the concept.

Tables III-10 and III-11 summarize tourism profiles for potential markets of Trail of the Great Bear by geographic origin. These tables address such elements as the mode of transport, length of stay, socio-economic and demographic characteristics, expenditures, the travel seasonality and activity preferences of existing travel markets to Alberta; a proportion of these will be potential markets for the Trail. The implications for Trail of the Great Bear are also briefly highlighted.

A detailed description of the potential market segments for the Alberta and the Montana portion of the Trail is presented in the following section.

TABLE III-10

TOURISM MARKET PROFILES FOR POTENTIAL TRAIL OF THE GREAT BEAR MARKETS BY GEOGRAPHIC ORIGIN ALBERTA PORTION

Overall Rank	Geographic Origin	Origin/ # Visitors	Destination	Mode of Transport	Length of Stay	Socio-Economic Characteristics	Demographic Characteristics	Expenditures (per capita)	Travel Season	Activities	Implications for Trail of the Great Bear
1	Montana (Existing)	•Montana 170,000 - person trips * (1988 CTS)	•Calgary •Banff •Edmonton	•Private Vehicle •Plane •Bus	•4.1 nights in Alberta	•High school post secondary •30,000+ income	•Families •aged 25-54		•Year round	Visit parks, campgrounds Cultural events Rodeos	High repeat visitors Focus on scenery Outdoor attractions
1	British Columbia (Existing)	B.C. 936,000 person trips * (1988 CTS)	•Calgary & District •Edmonton •Banff •Chinook Country	•Private Vehicle •Bus •Plane	•60% spend between 3-7 nights •20% spend 1-2 nights •4.1 nights in Alberta	•High school & post secondary •$20,000 - $49,999 income	•Male & Female •Married/Single •Age 25-44 and 45-64	$57/day in Alta. (1987)	•Year round	VFR Shopping Sightseeing Nightlife/Recreational Activities Visit Zoo/Museum/ Natural Display Visit national park Participate in outdoor activities Dining in high quality restaurants	Emphasis on natural resources Short segments en route Short trips
1	Sask. (Existing)	Saskatchewan 683,000 person trips * (1988) CTS)	•Calgary & District •Edmonton •Gateway •Banff •Chinook Country	•Private Vehicle	•3.3 nights in Alberta	•High school & some post secondary •$20,000-$49,999 income	•Young/middle family •Couples	$61/day in Alta. (1987)	•Year round	VFR Shopping Sightseeing Nightlife/Recreational Activities Visit National Park Participate in outdoor activities Dining in high quality restaurants	Short loop tours Key attractions

Source: 1988 Canadian Travel Survey, 1982 Alberta Travel Survey, Statistics Canada, Alberta Tourism

Note: Dollar amounts refer to Canadian funds.
Blank: Data not available

- Person trips are defined as all visits, including repeat visits by the same individuals.

TABLE III-10 Continued

Overall Rank	Geographic Origin	Origin/ # Visitors	Destination	Mode of Transport	Length of Stay	Socio-Economic Characteristics	Demographic Characteristics	Expenditures (per capita)	Travel Season	Activities	Implications for Trail of the Great Bear
2	Germany (Existing)	•Germany 47,700 (1989 Stats Canada)	•Banff & Jasper	•Plane •Auto •R.V.	•8.7 nights	•Post Secondary education •Young adults	•45+ yrs.	$53/day in Alta. (1989)	•summer	Sightseeing Photography Camping	Long trips; travel larger portions on route
	Germany *(Potential)	•Culture & Nature: (1,900,000)	•Alberta	•Plane •Auto •R.V.	•longer than 8.7 nights	•18-34 years of age •University educated	•Single		•Summer	Interested in nature, cultural groups Nature features such as wildlife and birds, wilderness camping independent travel	Natural attractions/resources key Motorhome rentals (fly and drive)
2	Japan (Existing)	•Japan 93,362 (1988 Stats. Canada)	•Banff & Jasper	•Plane •Bus	•3.6 nights in Alta.	•Higher income •Better educated	•Female •Married •45+ yrs.	$143/day in Alberta (1989)	•Summer	Sightseeing Shopping Dining Out Tours	Require luxury accommodation Recognized attractions High level of hospitality
	*(Potential)	Culture & Nature: (2,300,000)	•National Parks	•Plane •Bus •Auto	•Longer than 3.6 nights	•Low/high income •University educated	•Student •Professional		•Summer, Winter	Interested in native/ cultural groups Visiting historical sites Wilderness/sightseeing/ tours Outdoor activities	Top quality hotels Excellent service Promote national parks
2	United Kingdom (Existing)	•U.K. 99,800 (1989 Stats. Canada)	•Banff & Jasper	•Plane •Rental Car •Bus(same)	•9.4 nights in Alta.	•Less educated •Lower income	•Older male/ female	$45/day in Alta. (1989)	•July through October	Shopping Photography Dining out Sightseeing	Short loop tours Large VFR market Daytrippers Shopping/food amenities
	U.K. *(Potential)	•U.K. Culture & Nature: (750,000)	•Alberta	•Plane •Auto	•9.9 nights	•University educated	•Female/55 yrs. & over		•Summer •potential for spring, fall, winter	Visit cultural sites Nature related sightseeing Small towns/villages Local crafts, festivals Native groups	Lack of awareness Promotion key if pursued High level of hospitality

Source: 1986, 1988 Canadian Travel Survey, 1982 Alberta Travel Survey,
Statistics Canada, Alberta Tourism, Pleasure Travel Markets to N. America - 1989 Report

Note: Dollar amounts refer to Canadian funds.
Blank: Data not available.

* Potential markets represent the entire 'culture and nature' travel segment who would have a propensity to seek features such as those included along the Trail. Only a proportion of these will be projected for incremental visitations to the Trail.

TABLE III-10 Continued

Overall Rank	Geographic Origin	Origin/ # Visitors	Destination	Mode of Transport	Length of Stay	Socio-Economic Characteristics	Demographic Characteristics	Expenditures (per capita)	Travel Season	Activities	Implications for Trail of the Great Bear
3	Other Canada	•Ont./Que./ Manitoba •Atlantic Provinces 484,000 (1988 CTS)	•Calgary & District •Edmonton •Banff •Chinook Country	•Private Vehicle •Plane •Bus	•10% spend no nights •Aver. 4.4 nights in Alberta	•High school post secondary education •$30,000+ income	•Male & Female •Married/single •Age 25-54	$58/day in Alberta (1989)	•Year round	VFR Shopping Sightseeing Nightlife/Recreational Activity Dining at high quality restaurants Visit Zoo/Museum/ Natural Display Visit Nat./Region./ Historic Site.	Recognized destinations/ attractions Short loop tours Hospitality services
3	Other U.S.A.	•Pacific •Mountain •East/West North Central 1,002,900 (overnight visits 1989)	•Calgary •Edmonton •Banff •Waterton	•Private Vehicle •Plane •Bus	•4.1 nights in Alta. (Stats Canada)	•Upscale •High school & Post Secondary •$30,000+	•Retired/older couples	$84/day in Alberta (1989)	•Summer (June - Sept.) winter and some shoulder season	Touring Relaxing Photography Visiting Sites/Attractions Recreational Activities	Sightseeing
3	Other Overseas	•155,493 (1988 CTS)	•Alberta	•Plane	•10.52 nights	•low-med income •high school	•Young Couple •Grown Family •Older Couple	$35/day in Alta. (1986)	•Summer (June - September)	Sightseeing, Photography, Picnicking, VFR, Relaxing, Shopping	Recognized destinations Short loop tours

Source: 1986, 1988 Canadian Travel Survey, 1982 Alberta Travel Survey,
Statistics Canada, Alberta Tourism, Pleasure Travel Markets to N. Amercia - 1989 Report

Note: Dollar amounts refer to Canadian funds.
Blank: Data not available - further research required.

TABLE III-11

TOURISM MARKET PROFILES FOR POTENTIAL TRAIL OF THE GREAT BEAR MARKETS BY GEOGRAPHIC ORIGIN MONTANA PORTION

Overall Rank	Geographical Origin	No. of Visitors (# Person Visits)	Origin	Destination	Length of Stay	Mode of Transport	Socio-Economic Characteristics	Demographic Characteristics	Expenditures	Activities	Implications for Trail of the Great Bear
	United States										
1	Pacific Coast States	639,220	California, Washington	Montana: •Glacier Country	Air Travellers: 5.45 nights	•73% Auto •27% Plane	•Older/retired •$20,000-$40,000 Income	•College degree	$63.13 per party per day	Day hiking/walking Photography	Short loop tours
1	Mountain States	433,020	Idaho, Wyoming	•Yellowstone Country	Highway Travellers: 3.1 nights					Visiting historic sites Auto/R.V. Camping	Outdoor attractions
	North Central States	433,020	Minnesota, Colorado, Oregon	•Custer Country							
	Canada										
1	Alberta	65,984	B.C., Saskatchewan	•Glacier Country •Yellowstone Country •Custer Country	By Air: 5.45 nights By Vehicle: 3.1 nights	•Auto •Plane	•Older/retired •$20,000-$40,000 Income	•College degree	$63.13 per party per day	Day hiking/walking Photography Visiting historic sites Auto/R.V. Camping	Recognized attractions Natural resources
3	Other Canada	98,976									
2 & 3	Overseas	100,000 (Based on visitation to Yellowstone National Park)	Germany, Switzerland, England (U.K.) Japan	•Yellowstone N.P.	By Air: 5.45 nights By Vehicle: 3.1 nights	•Auto •Plane •Some Bus	•Couples •Families	•Well educated		Day hiking/walking Photography Visiting historic sites Auto/R.V. Camping	Hospitality services Short trips

Source: 1988 Montana Travel Survey; Montana Tourism Research Project; Yellowstone National Park Visitor Study, 1989

Note: Dollar figures in U.S. Funds
Blank: Data not available

3.4.3.5 Segmentation by Geographic Origin - Alberta

Primary Markets

The Alberta tourism markets are important in the sense that they are easily accessible to the Trail and will constitute an important market segment during the initial short term marketing of the concept. As explained previously, however, the identification of potential market segments has concentrated on the non-resident markets since they will generate new revenues into the province.

As such, the provinces of British Columbia and Saskatchewan are considered important potential market sources for the Trail of the Great Bear. The most important destinations cited for residents of these provinces include Calgary, Edmonton and Banff. These visitors are largely VFR (visiting friends and relatives) and vacation markets who travel mainly by private automobile. Montana residents also represent prime potential markets for the Trail given their propensity to travel out of state and their view of Alberta as a place to engage in outdoor recreation activities. Consequently, increased cross border visitation between the province/state should occur. The proposed concept offers the opportunity to seek adventure tourism and recreation in a clean, safe mountain setting.

Secondary Markets

Alberta's major overseas markets are summarized as follows:

Country of Origin	# of Visitors			Average Length of Stay in Nights
	1988	1989	% Change	
Japan	93,362	91,200	(.02%)	3.6
United Kingdom	86,500	99,800	15.4%	9.4
Germany	52,105	47,700	(.08%)	8.7

Source: Alberta Tourism; Statistics Canada, July 1990

According to Alberta Tourism, international visitors to Alberta accounted for 2.4% of all overnight visits within the province in 1988.

Japan

The major international geographic market which has been targeted by every city in North America is the Japanese market. This market is projected to reach 11 million outbound trips by 1990, with the encouragement of the Japanese government. Despite the slight decrease in visitations from 1988 to 1989, the Japanese market to Alberta has grown overall by 40% since 1979, with the majority of Japanese tourists visiting the Banff Rockies. Alberta's share of this market, however, is still only .6%.

Research indicates that the Japanese market shows a high propensity to visit large cities and well-serviced national parks. Their perceptions and interest in Waterton National Park and Montana, however, are low. This may well be a market awareness issue that could be resolved through promotional efforts.

A key potential market for Trail of the Great Bear within the larger Japanese market is the "Japanese Culture and Nature Segment". The 1989 Pleasure Travel Markets to North America Report published by Tourism Canada highlights the interests for this group such as visiting historic sites, understanding native and cultural groups, and seeing wilderness and nature. This segment is represented by some 2.3 million potential Japanese travellers. The competitive advantages for the proposed corridor to attract this market include the outstanding scenery, national parks and wilderness areas combined with the personal safety and cleanliness that Alberta and Montana offer. A potential constraint, however, would be the minimal number of well developed facilities en route to accommodate the Japanese need for high quality hotels and fine dining facilities.

Germany

The German market to North America is most compatible with the proposed concept. This group has a strong interest in touring trips that involve features such as: wildlife and birds, national parks, mountainous areas, and outstanding scenery. They take extended vacations, and many tend to be "fly and drive" tourists who rent recreational vehicles.

General trends of this market reveal that growth to "non-sun" destinations has begun to outpace traditional resorts. There has also been a steady increase in the use of the travel trade for holiday bookings. Demand for more "active" holiday vacations has been growing, especially for holidays abroad (Economic Intelligence Unit, 1989). These trends bode favourably for the Trail of the Great Bear concept.

United Kingdom

The size of this market to North America has doubled within the past three years, although the United States has experienced the majority of growth, not Canada. The "culture and nature" segment of this market is particularly suitable to the proposed corridor concept. This segment is characterized by females age 55 and over who travel for extended periods of time (average of 45 days) to visit friends and relatives, and enjoy the sightseeing opportunities of nature related tourism. The number of potential travellers in this segment is approximately 750,000 people.

Tertiary Markets

Travellers from other areas in Canada and the United States are important potential markets for the Trail of the Great Bear. The world class skiing in the Banff/Lake Louise area attracts a significant number of out-of-province skiers (10.5% or 184,800 skiers - Alberta Downhill Ski Market Analysis, 1984) as do other attractions in the Banff National Park and surrounding area. The Trail of the Great Bear offers numerous outdoor recreational activities, wildlife, historic and cultural products along the Alberta portion of the route that could draw Canadian and American tourists to the Trail. According to Alberta Tourism and Statistics Canada (1982 and 1988), the American visitors to Alberta account for an estimated 10.4% of out-of-province overnight visits, and originate from the States listed in Table III-12 as follows:

TABLE III-12

MARKET SHARE OF ALBERTA VISITATION

State of Origin	Percent	Total Person Nights
California	4%	955,308
Northwest States (Montana, Idaho, Wyoming)	3%	716,481
Pacific Northwest (Washington, Oregon)	3%	716,481

Source: Alberta Travel Survey, 1982;
Statistics Canada, 1988

The primary destinations sought were Banff, Calgary and Jasper. Studies of United States markets indicate a strong interest in scenery and attractions. Activities pursued are typically sightseeing, photography, recreational activities and nightlife/dining.

Given the strong contribution of the American States to Alberta's tourism, it is evident that the marketing for the proposed corridor should be strongly focused towards the Pacific and northwest states.

3.4.3.6 Market Segmentation by Geographic Origin - Montana

Primary Markets

The Montana Travel Survey (1988) reveals that Americans travelling from other states represent strong markets for Montana. Table III-13 represents the market share of each for Montana.

TABLE III-13

NON-RESIDENT VISITATION TO MONTANA

Origin	Percentage of Visitation
Pacific States	31%
Mountain States	21%
North Central States	21%
Southern States	6%
South Atlantic States	6%
Northeastern States	5%
Canada	8%
Other Countries	2%

Source: 1988 Montana Travel Survey

Given that the Pacific, Mountain and North Central States represent the majority of travel to Montana, it would be logical to assume that a percentage of these markets would be most likely to travel portions of the Trail of the Great Bear. These groups typically travel to Montana via private vehicle and stay an average of 3.1 nights.

Americans travelling to Montana participate in activities such as day hiking/walking, photography, visiting historic sites and auto/recreation vehicle camping.

Secondary Markets

The overseas market is another potential market source for Montana. Research has revealed that Montana currently attracts visitors from Germany, Japan, Taiwan and England. The number of visitors from those overseas markets is currently very small, but this market shows long term potential for Trail of the Great Bear and would respond well to strong marketing efforts.

The primary attraction for the overseas segment in Montana is Yellowstone National Park. For more detailed information on the German and United Kingdom market characteristics, refer to the segmentation by geographic origin for the Alberta section of this report (Section 3.4.3.5).

3.4.3.7 Market Segmentation by Trip Purpose

A generally accepted method of segmenting visitors to Alberta and Montana is by trip purpose. The following sub-segments listed in Table III-14 have been identified and described under trip purpose as offering potential for the Trail of the Great Bear.

TABLE III-14

MARKET SEGMENTATION BY TRIP PURPOSE

Trip Purpose	Overall Rank
National Parks	1
Special Interest Groups	2
Attractions/Special Events	3
Visiting Friends and Relatives	3
Short Getaway	4
Group Touring	5

Source: Pannell Kerr Forster research

Table III-15 summarizes the tourism profiles for potential Trail of the Great Bear markets by Trip Purpose for both Alberta and Montana:

TABLE III-15

TOURISM MARKET PROFILES FOR POTENTIAL TRAIL OF THE GREAT BEAR MARKETS BY TRIP PURPOSE ALBERTA AND MONTANA

Overall Rank	Pleasure Travel	Origin/ # Visitors	Destination	Mode of Transport	Length of Stay	Lodging	Socio-Economic Characteristics	Demographic Characteristics	Expenditures (per capita)	Travel Season	Activities	Implications for Trail of the Great Bear
1	National Parks	All markets •Banff 3.7M (1988) •Waterton 605,000 •Yellowstone/ Glacier 2.2M	•Banff •Waterton •Glacier •Yellowstone	•Auto	•2-3 days •Day trippers	•Camp •Hotels •VFR	•Affluent •White collar	•25-44 yrs. (families) •Seniors	$72/day	•Summer/ winter	Sightseeing View wildlife Shopping Photography	Focus on natural features Captured market; limited appeal to destinations on route
2	Special Interest Groups	•Canada unavailable	•International •U.S.	•Plane •Auto	•14 days	•Hotels •Resorts	•Affluent	•40-70 yrs	$152/day	•Summer/ winter	View wildlife Special sports Nature Photography	Infrastructure upgrading Quality restaurants Interpretive services Unspoiled wilderness
3	Visiting Friends and Relatives	•Alberta •Other Canada •Europe # Visitors 4.8 M (1988 CTS)	•Calgary •Edmonton	•Auto	•2-3 days	•With friends & relatives •Hotels/ Motels	•Some Secondary Education •$40,000/yr. income	•20-44 yrs. of age	$40.75 day in Alberta	•Year round	Shopping Sightseeing	Highlight key attractions Upgrade services

Source: 1988 Canadian Travel Survey, 1982 Alberta Travel Survey, 1988 Montana Travel Survey, Statistics Canada, Alberta Tourism, Environment Canada Parks, Rocky Mountain National Parks Utilization Study 1989, Yellowstone National Parks Visitor Service Project, 1988

Note: Dollar amounts refer to Canadian funds
Blank: Data not available

TABLE III-15 Continued

Overall Rank	Pleasure Travel	Origin/ # Visitors	Destination	Mode of Transport	Length of Stay	Lodging	Socio-Economic Characteristics	Demographic Characteristics	Expenditures (per capita)	Travel Season	Activities	Implication for Trail of the Great Bear
3	Attractions/ Special Events	All markets	•Enroute Banff/Jasper •Calgary •Edmonton	•Auto	•1-2 days	•Hotels/ Motels •Friends/ Relatives		•Families •Seniors •White collar	$46.47 (in Alta.)	•Year round	Sightseeing Visit Museums/Parks Calgary Stampede Rocky Mountains Buffalo Jump Sites C.M. Russell Museum	Directional/international signage Interpretive services Hospitality services
4	Short Getaway	Less than 400 km. away Regional markets		•Auto	•1-2 nights	•Hotels/ Motels	•Some Secondary Education	•29+ yrs. age •Single or Married •$40,000/yr. income		•Spring/ Summer	Shopping Nightlife Sightseeing VFR	"Low stress" environment Promote easy access/ backcountry areas
5	Group Touring	Alberta Ontario B.C. Canada 180,000 to Banff 12,000 to Waterton	•Enroute Western	•Plane •Bus	•2-3 days (in Alta.)	•Hotels/ Motels	•Higher Income	•50+ •Seniors	$39.47/day (1987)	•Spring/ Summer	Sightseeing Attractions	Upgrading highways Good access to attractions Short loop tours

Source: 1988 Canadian Travel Survey, 1982 Alberta Travel Survey, 1988 Montana Travel Survey,
Statistics Canada, Alberta Tourism, Environment Canada Parks,
Rocky Mountain National Parks Utilization Study 1989, Yellowstone National Parks Visitor Service Project, 1988

Note: Dollar amounts refer to Canadian funds
Blank: Data not available

National Parks Market

Visitors to national parks offer potential appeal for the Trail of the Great Bear as they represent a captured market with a strong focus on natural features such as viewing wildlife, sightseeing, and exploring the natural environment.

One major focus of this project is to draw visitors from national parks to various destination points within the Trail of the Great Bear route. Promotional material distributed within the parks system would familiarize this market with the attributes of the Trail of the Great Bear concept, and encourage parks visitors to proceed along the Trail of the Great Bear route to experience various natural, cultural, and historic features. There are, however, potential regulations by the national parks which could preclude brochure distribution inside the parks.

Special Interest Groups

Many people think of special interest groups in terms of scuba divers, bird watchers, backcountry skiers or ecotourists whose sole preoccupation is the pursuit of that specialized interest. Special interest groups are defined as groups of people who are going somewhere with a particular interest that can be pursued in a particular region (Read, 1980). Special interest tourism is expected to be a prime force in the expansion of tourism in the next few decades.

A special interest group that would be a strong potential market for Trail of the Great Bear is the ecotourist. This group has interests in specific aspects of the natural environment, as well as the livelihood of an area and its people as man interacts with the environment.

A recent document titled "A Profile of Ecotourists and the Benefits Derived from their Experience" from the University of Waterloo outlines some of the key factors indigenous to ecotourism:

- involves the protection of natural areas;
- involves strict management of natural, historic and cultural resources;

- involves local inhabitants (guides, park wardens) to ensure long term success;
- involves economic benefits to provide support and funding of parks, forest reserves and wildlife refuges; and,
- involves limited friction between the environment and the local people.

The following characteristics of Canadian ecotourists are highlighted in this document as follows:

- the average age was 54 years old; the largest proportion were between 60 - 69 years old;
- the average income was approximately $69,000 (Cdn.) in 1988;
- approximately 30% have university degrees; 10% have doctoral degrees;
- typically characterized as well educated, mostly male, in their low 50's and earn substantial income;
- seek well spaced, up-scale hotel accommodation in a rustic setting with good quality food;
- ecotourists stay for a longer duration at their destination than conventional tourists (average of 14 days for each trip in 1989);
- seek destinations within three to four hour drive from a major airport;
- have a strong regard for the environment.

The Trail of the Great Bear concept has some key resources that would be of particular interest to this environmentally conscious market segment. Research indicates that approximately 90% of ecotourists visit national parks which support "soft adventure" tourism. This market seeks out environmentally sound areas that have the following resources:

- wilderness areas
- national parks
- rural areas
- cultural activities
- mountains
- lakes and streams
- historic sites
- wildlife in its natural habitat

These resources have all been identified along the Trail of the Great Bear route in the inventory assessment.

In terms of the size of the ecotourism market in Canada, reliable data are lacking. Ecotourists from Canada travelling to Costa Rica alone are estimated to range between 10,000 to 30,000 per annum. The tour groups are typically composed of between seven to 20 people, with an average number of 11 people.

The facilities required for this market include hotels, motels, and resort lodge properties. Although about 10% of this market use campgrounds and trailer parks at some point while on vacation, almost 99% have used hotels, motels and resort properties.

In summary, this special interest group represents a key target market for the Trail of the Great Bear given the environmental focus of the concept. The natural, cultural and historic resources along the route are compatible with the needs of the ecotourist. This special interest group would be likely to utilize the route for all season activities, especially wildlife viewing in the spring and fall.

Visiting Friends and Relatives Market

The VFR market is the second largest market for Alberta next to pleasure travel. According to the 1988 Canadian Travel Survey, approximately 28% or 4.8 million person trips were made by Canadians to Alberta to visit friends and relatives. The 1982 Alberta Travel Survey reports that 53% or 2.0 million person trips were made by non-residents to visit friends and relatives. The 1988 Montana Survey shows that 27% of non-resident highway travellers and 46% of non-residents who fly to Montana are part of this market. Research reveals that this market is most likely to visit the major cities and attend major events and attractions.

This market offers good potential for the Trail of the Great Bear due to its size and propensity to travel.

Major Attractions/Special Events Market

The size of this market is currently unknown. However, it is evident that both Alberta and Montana attractions and special events are a major tourism generator.

An example of the drawing power for some of the more major attractions/events is detailed below:

Attraction/Special Events	Visitation (1989)
City of Calgary	8.9 million
Calgary Stampede	1.2 million
Banff National Park	4.0 million
Jasper National Park	1.8 million
The Royal Tyrrell Museum	500,000
Glacier National Park	1.8 million
Yellowstone National Park	2.6 million

Source: Environment Canada - Parks; 1988 Canadian Travel Survey; Tyrrell Museum of Palaeontology, 1989; U.S. National Park Service.

The proposed corridor should attempt to draw destination visitors from some of these attractions to the designated loop tours along the Trail of the Great Bear with specific attractions.

This market is attracted to major city centres and recognized tourist areas (i.e. Banff). They travel by automobile, require hotel/motel facilities and/or friends and relatives for accommodation.

Group Touring Market

While not specifically a trip purpose market, the group touring market segment deserves particular mention as a pleasure travel target market due to its size, the specific "audience" for sales of such tours, and due to the likelihood that it will increase with the growth of the mature market (persons aged 50 plus). The group touring market (bus passengers) represents only 6% of visitation to Banff and 3% to Waterton. In Yellowstone, however, the group touring market comprised 30% of the total visitations between January and October, 1990.

The predominant modes of transport for this market segment are motorcoach, air and train. This market seeks product attributes such as educational heritage, historical and cultural sites, and beautiful scenery which can be found along the Trail. The upgrading of direct highway routes to key attractions and ease of accessibility to the routes would enhance the appeal of the Trail of the Great Bear concept.

Short Getaway Market

This is a rapidly growing segment of the tourism industry as the demands of work take precedence over longer vacations. The increase in weekend travel and combined business and leisure travel has resulted in a growing trend towards shorter, more frequent vacations (3-4 days in duration). The purpose of these trips is mainly for recreation and relaxation. The private automobile is the most common form of transportation, especially with distances under 400 kilometres.

3.4.3.8 Market Segmentation by Mode of Transport

Segmentation by mode of transport provides an indepth understanding of the potential traveller for Trail of the Great Bear. While all of the sub-segments revealed in Table III-16 are important potential groups for the Trail, the private automobile travellers represent the most likely market for the proposed corridor followed by recreational vehicle travellers and "fly and drive" groups.

TABLE III-16

TRAIL OF THE GREAT BEAR
MARKET SEGMENTATION BY MODE OF TRANSPORT

Mode of Transport	Overall Rank
Private Automobile Travellers	1
Recreational Vehicle Owners	2
Fly and Drive	3
Recreational Vehicle Rental Agents	3
Motor Coach Tours (regional/international)	4

Source: Pannell Kerr Forster research

Table III-17 summarizes the tourism market profiles for potential Trail of the Great Bear markets by mode of transport.

TABLE III-17

TOURISM MARKET PROFILES FOR POTENTIAL TRAIL OF THE GREAT BEAR MARKETS BY MODE OF TRANSPORT ALBERTA AND MONTANA

Overall Rank	Mode of Transportation	Client Origin	Destination	Season	Demographics	Length of Stay	Services Desired	Implications for Trail of the Great Bear
1	Private Auto	Alberta Montana Idaho, Oregon Other Canada/U.S.	Cross Canada South. Alta. through Montana, Yellowstone	Summer Spring/Fall Secondary	20's and 30's Seniors Secondary Education	14 days	Gas stations, Pulloffs, Scenic outlooks	Information services Scenic outlook; pull-offs Promotional brochures
2	Recreational Vehicle Associations (Private Owners)	Alberta B.C. Saskatchewan Montana Pacific Coast States	Unless caravanning, 60-100 miles from home	Spring Summer (prime) Fall	Seniors Families	Weekends; Extended 2 Week Trips	Campgrounds, Rest Stops, Picnic Areas	Serviced campgrounds Sufficient parking Easy access to routes/loop tours
3	Fly and Drive	Eastern Canada 60%, Britain 20% Germany 20%, Eastern U.S. Coast Midwest; 10% Germany and Japan	Calgary to the Rockies 50%; Calgary to Vancouver 50%; Kalispell to Banff, Waterton Glacier to Kalispell or Yellowstone	Summer Prime Winter-Secondary	35-45 yrs. Upper Middle Class Usually Couples	Summer 10-14 days Winter 7 days	Rental car agencies, Pick up/drop off places	Access to airports/gateways Tourism services

Source: Pannell Kerr Forster research

Blank: Data not available

TABLE III-17 Continued

Overall Rank	Mode of Transportation	Client Origin	Destination	Season	Demographics	Length of Stay	Services Desired	Implications for Trail of the Great Bear
3	Recreational Vehicle Rental Agents	Europe 90%+ (40-60% German)	Calgary-Banff-Jasper-Vancouver and return Calgary-Banff-Van.-L.A. and return.	Late Spring Summer (Prime) Early Fall	25-40 yrs. 2 - 4 in group Upper & Upper-middle class	19 - 27 days	Power supply and sanitation at campgrounds; Reasonable cost.	Drop-off points for vehicles Serviced campgrounds
4	International Operator Motor Coach Tours	United States England, Japan Australia, Austria Switzerland, Germany	Glacier, Kalispell, Banff, Lake Louise, Jasper. Points in B.C.	Summer 86% Spring 7% Fall 7%	40+, 50+ Upper-Upper middle/middle class.	3 - 9 days	Moderate/first class lodging; no break in services enroute; travel to key destinations in one day.	Major attractions Promotional brochures Direct routes
4	Regional Operator Motor Coach Tours	Edmonton, Calgary, U.S., Australia, New Zealand, Britain	Calgary-Banff-Jasper, Waterton/Glacier/Yellowstone/Great Falls/Helena, California, Florida. All other U.S. except the midwest.	Summer 40% Spring 20% Fall 20% Winter 20%	45+ Seniors	2 - 4 days	Mid range lodging	Major attractions Promotional brochures Direct routes

Source: Pannell Kerr Forster research

Blank: Data not available

Private Automobile Travellers

This group represents a strong potential market for the proposed corridor. Private automobile travellers account for 86% of personal travel in North America. Research indicates that Canadian members venture further than their American counterparts; however, the majority of auto trips in Canada were under 320 kilometres (70%) and few were over 800 kilometres. Over the last five years in Alberta there has been a 25 - 30% increase in auto touring. Although exact percentages are not available, research revealed that Montana has also seen an increase in auto touring.

The preferred trip destination for automobile travellers originating from Alberta include:

- Across Canada to the Maritimes
- To Yellowstone through Southern Alberta
- Across Montana to Idaho, California and Oregon.

Montana residents are more likely to travel out of state. A recent influx of tourists from California has been experienced by the Montana automobile association. Montana residents tend to travel much longer distances than other American auto travellers. This could be attributed to the vastness of the state of Montana. They typically travel at least 500 miles (830 kilometres) and take 2 - 3 days en route to reach their final destination (Montana - American Automobile Association).

Recreational Vehicle - Private Owner

The regional recreational vehicle owners represent a key market for weekend travel to the proposed corridor.

For weekend travel, however, this market does not venture farther than 100 - 150 kilometres from home. Except in the case of organized caravans, clubs do not track the mileage driven by individual travellers on longer treks. The trip purpose covers a wide spectrum, and is dependent upon the interests of specific clubs. Of prime interest is socializing, sightseeing and walking/hiking. As well, tours are sometimes arranged with museums at the destination.

Dependent upon the time factor, this market may do loop side tours enroute to the destination. When a caravan is organized, they may travel as far as 6,000+ kilometres for six weeks or more. (Alberta Travel Trailer Association).

Interviews with recreational vehicle associations and national affiliations revealed that the demographic characteristics of their members varies widely to include young couples, families, empty nesters and senior travel groups with diverse economic and educational backgrounds.

This market prefers fully-serviced sites, although most recreational vehicles are self contained units. The concept of Trail of the Great Bear appealed to individual members, although they would not likely travel the whole route unless on an extended vacation.

Fly and Drive Market

This represents a distinct market for the Trail of the Great Bear concept as they are most likely to be "non-local" tourists to the area. In the Calgary area, for instance, the majority are from out of province (60%), with a significant proportion originating from the United Kingdom and Germany (40%). The Montana market draws visitors from the eastern United States coast and the Pacific northwest as well, with about 10% of this market represented by overseas travellers (Germany, Japan).

Research with car rental agencies catering to this type of traveller indicate that they travel predominantly in the summer months for between one to two weeks in duration. The average mileage is 1,200 miles (1,992 kilometres) per trip. Winter trips are primarily ski related and last approximately one week in length, while spring and fall trips are not so popular.

Recreational Vehicle - Rental Agents

This market is comprised primarily of European tourists vacationing in Canada (90% of the market). The remaining 10% includes Japanese, Canadian and American travellers. This market typically travels in groups of two to four people, with an age range of 25 - 60 years. Excursions typically last from 19 - 27 days.

Although this market is small in size (mainly international), they have an appreciation for wildlife, small towns, and scenery which complements the proposed concept. They tend to travel for an extended period of time for long distances. The following three types of trips are frequently sought:

- Calgary-Banff-Jasper-Vancouver-Calgary
- Calgary-Banff-Jasper-Prince George-Vancouver-Calgary
- Calgary-Banff-Vancouver-Los Angeles-Calgary

Motor Coach Tours

International tour operators were surveyed on their views of the proposed concept and their market characteristics. Users originated from various countries such as: the United States, England, Germany, Australia and Japan. The average age was 40 years, comprised mainly of upper to middle class travellers. The primary trip purpose was sightseeing, with viewing historic and cultural sites as a secondary interest.

This market requires a range of accommodation facilities from deluxe hotels to moderate style motels, dependent upon the level of the tour. As tours frequently stop every two to three hours, a sufficient number of gas stations, rest stations and food and beverage facilities should be accessible along the main route.

The international motor coach tour operators were interested in the concept, but did not foresee a large demand for this proposed corridor. Their largest concern was that the existing facilities both in Alberta and Montana did not meet the standards required of some overseas markets (i.e. Japanese travellers). The regional tour operators also felt that the domestic markets would be more likely to take their own vehicles en route.

3.4.4 Potential Demand for the Tour Corridor

3.4.4.1 Introduction

The development of the Trail of the great Bear would impact on the existing number of visitations to the proposed corridor area by drawing on existing visitors, and by attracting new visitors to the area. An analysis of potential demand relies heavily on existing data in terms of visitation to Alberta and Montana as a base to calculate the incremental visitation to the proposed corridor from current visitors. Once the incremental visitation to the Trail of the Great Bear corridor is determined, a further analysis of the potential new visitation is calculated based on percentages of the entire market potential for Trail of the Great Bear. These estimates are based on key assumptions throughout the analysis as follows:

- the visitation projections are based on a stabilized year, not the first year of operation;
- these projections are also based on non-resident markets which will generate new revenue to the state or province, and takes the long term growth into consideration;
- the Trail of the Great Bear concept is aggressively marketed to key potential markets;
- further development and upgrading of the routing, infrastructure, service nodes and so on are initiated; and,
- geographic market segments are not entirely mutually exclusive.
- A stabilized year is defined as a time period in which the Trail of the Great Bear is fully operational. Depending on the time frame for upgrading existing services and facilities combined with the development of additional ones, it is anticipated that a stabilized year will start from as little as ten years up to as much as 50 years after the initial opening of the proposed Trail.

3.4.4.2 Estimated Visitation to the Proposed Corridor

Visitations From Existing Visitors

The incremental visitations to the corridor area as a result of the Trail of the Great Bear project were analyzed separately for the Alberta and Montana portions of the route in order to utilize these figures for an independent economic impact analysis for each. The existing tourism flow to Alberta and Montana was used as a base in order to assess incremental tourism flows to the Trail of the Great Bear route from existing visitors to Alberta and Montana. From the base visitation figures, percentages were assigned to the geographic market segments to determine the potential increase in day use and overnight visitation that the Trail of the Great Bear route could generate.

In order to estimate percentages for each segment, the research relied heavily on secondary analysis of comparable scenic byways over time. It is difficult to generate primary research that addresses a level of anticipated usage with any level of accuracy.

Comparable corridors that maintained information of patterns of visitations were the Blue Ridge Parkway and the New York Seaway Trail. The average annual daily traffic counts over time at various sections along the routes were utilized as well. An analysis of three sections of the New York Seaway Trail from the period of 1983 to 1988 revealed an increase in traffic volume ranging from 13 - 23%. This increase was most likely attributed to the additional tourism flow created by the scenic touring route. The Blue Ridge Parkway reported an increase in tourism visitations of 44% over a five year period from 1983 to 1988.

The estimated incremental visitation from current visitors to the Alberta and Montana portions of the Trail of the Great Bear route, by region, are detailed in Table III-18 and Table III-19 as follows:

TABLE III-18

ALBERTA
POTENTIAL (LONG TERM) INCREMENTAL VISITATION TO THE TRAIL FROM CURRENT VISITORS TO PROVINCE
(person visits per year)

Market Segment	Existing Visitation	Length of Stay	Increase - Day Use	Increase - Overnight Use	Total Increase
Canada	2,544,000 *	1.7	254,400	381,600	636,000
United States	1,441,000	2.0	72,050	72,050	144,100
Overseas	399,000	2.0	39,900	59,850	99,750
Total	4,384,000		366,350	513,500	879,850

Source: Alberta Tourism, Pannell Kerr Forster research

* Excludes visitations by Albertans within the province.

Assumptions:

1. Potential incremental visitation concentrates on the non-resident market segments since they will generate new revenues into the province. The Alberta resident markets which are attracted to the corridor will, however, assist in stopping tourism revenue leakages outside of the province.

2. Assumes a stabilized year in which the concept is fully operational, thus the market focus is on long term markets (i.e. overseas).

3. Length of stay are estimates on how long each market will spend along the Trail.

4. Overnight stay is presumed to be one or more nights.

5. Mathematical calculations for incremental visitations were derived as follows:

Existing Visitation x Incremental Percentage Day Use/Overnight Use * =
Increase - Day Use/Overnight Use

* Incremental percentages are detailed for each market segment in Section Three of this report.

TABLE III-19

MONTANA
POTENTIAL (LONG TERM) INCREMENTAL VISITATION TO THE TRAIL FROM CURRENT VISITORS TO STATE
(person visits per year)

Market Segment	Existing Visitation	Length of Stay	Increase - Day Use	Increase - Overnight Use	Total Increase
United States	4,510,800 *	1.7	225,540	225,540	451,080
Canada	564,200	2.0	56,420	84,630	141,050
Overseas	25,000	2.0	2,500	3,750	6,250
Total	5,100,000		284,460	313,920	598,380

Source: University of Montana; Pannell Kerr Forster research

* Excludes visitations by Montana residents within the state.

Assumptions:

1. Potential incremental visitation concentrates on non-resident market segments since they will generate new revenues into the state. The Montana resident markets which are attracted to the corridor will, however, assist in stopping tourism revenue leakages outside of the state.

2. Same assumptions as for Alberta (2,3,4, 5 in Table III-18).

Table III-18 estimates that an additional 879,850 person visits per year could be generated to the Alberta portion of the Trail of the Great Bear route from tourism markets that are currently visiting the province of Alberta. Similarly, Table III-19 estimates that the Montana portion of the Trail of the Great Bear route could generate an incremental 598,380 tourism visits from existing markets to Montana.

The incremental visitation figures for the specific market regions for existing visitors were rationalized based on factors such as the region of origin, the distance of travel to the Trail, and the overall market trends for specific regions. The following tables indicate the percentages assigned to geographic market segments for Alberta and Montana:

TABLE III-20

INCREMENTAL VISITATION PERCENTAGES - ALBERTA

Market Segment	Day Use %	Overnight Use %
Other Canada	5 - 10%	10 - 15%
United States	3 - 5%	3 - 5%
Overseas	5 - 10%	10 - 15%

Source: Pannell Kerr Forster research

TABLE III-21

INCREMENTAL VISITATION PERCENTAGES - MONTANA

Market Segment	Day Use %	Overnight Use %
Other United States	3 - 5%	3 - 5%
Canada	5 - 10%	10 - 15%
Overseas	5 - 10%	10 - 15%

Source: Pannell Kerr Forster research

For both tables, the percentages assigned to United States visitations are considerably lower than the others mainly because of overall trends of this market. Fewer American tourists are visiting Canada and Alberta than in the past (United States auto visits have dropped by 1 million from 1988 to 1989 - Statistics Canada, 1990). Further, the number of overnight visits of United States travellers to Canada has dropped 6% from 1988 to 1989 (Statistics Canada, 1990). This trend shows no indication of changing in the near future. Consequently, a smaller percentage of overnight and day visits from U.S. travellers is expected in general compared to Canadian and overseas travellers.

Visitation From Potential New Visitors

The proposed scenic corridor will also attract new visitors who would not have otherwise travelled to the designated corridor area. In order to determine the additional visitations created by the route, the market potential for each of the key geographic segments was estimated based on current population statistics and research on pleasure travel markets to Canada and the United States. Capture ratios were then assigned to potential markets. The capture ratio refers to the percentage of the market segment that could be expected to visit the proposed corridor during a fully developed year. The capture ratios were derived based on several factors such as the region of origin, the distance of travel to the Trail, and the overall market trends for specific regions.

It should be noted that as the distance from the place of origin to the Trail of the Great Bear route increases by geographic market segments, the capture ratio can be expected to diminish. For instance, the capture ratio for Western Canada (1.0%) is relatively high compared to that for Eastern Canada (0.1%) given the closeness of this segment to the proposed route and the combined ease of accessibility. Tables III-22 and III-23 illustrate the potential new visitations to the proposed route.

The proposed development is estimated to attract 233,851 additional person visits from North America and 29,500 from overseas markets as indicated in Tables III-22 and III-23. While the largest capture ratio of increased visitations can be expected to originate from the Alberta and Montana geographic areas, the largest number of additional tourists originate from other parts of the United States - primarily the Pacific, Mountain and North Central states. This is understandable considering the large size of the potential markets from these areas. The increased tourism flow from overseas markets, although it appears insignificant, is considerable in relation to the current visitation figures for overseas visitors to Alberta and Montana.

TABLE III-22

POTENTIAL NEW VISITATIONS (LONG TERM) FROM NORTH AMERICA ENTIRE TRAIL OF THE GREAT BEAR ROUTE *

(person visits per year)

Market Segment	Population Base	Capture Ratio**	Incremental Visitation	Length of Stay	Increase Day Use	Increase Overnight Use
Canada						
West	4,127,000	1.0%	41,270	2.0	16,508	24,762
Central	17,548,000	0.1%	17,548	2.0	7,019	10,529
East	2,316,000	0.1%	2,316	2.0	926	1,390
Sub total	23,991,000		61,134		24,453	36,681
United States						
Pacific	37,135,000	0.2%	74,270	2.0	29,708	44,562
Mountain	12,502,000	0.2%	25,004	2.0	10,002	15,002
North Central	59,894,000	0.1%	59,894	2.0	23,958	35,936
Other	135,020,000	0.01%	13,549	2.0	5,420	8,129
Sub total	245,020,000		172,717		69,088	103,629
Total North America	269,011,000		233,851		93,541	140,310

* Assumes a stabilized year in which the concept is fully operational.

** Capture ratios are explained in detail in Section Three of the report.

TABLE III-23

POTENTIAL NEW VISITATIONS OVER THE LONG TERM FROM OVERSEAS ENTIRE TRAIL OF THE GREAT BEAR ROUTE *

Market Segment	Potential Market***	Capture Ratio**	Incremental Visitation	Length of Stay	Increase Day Use	Increase Overnight Use
Overseas						
Japan	2,300,000	0.5%	11,500	2.0	4,600	6,900
United Kingdom	750,000	0.5%	3,750	2.0	1,500	2,250
France	950,000	0.5%	4,750	2.0	1,900	2,850
Germany	1,900,000	0.5%	9,500	2.0	3,800	5,700
Total Overseas	5,900,000		29,500		11,800	17,700

Source: Pannell Kerr Forster research

* Assumes a stabilized year in which the concept is fully operational.

** Capture ratios are explained in detail in Section Three of the report.

*** Potential markets represent the entire 'culture and nature' travel segment who would have a propensity to seek features such as those to be included along the Trail.

3.4.5 Marketing Implications By Segment

3.4.5.1 Introduction

This section highlights the implications for Trail of the Great Bear for the three designated market segments by geographic origin, trip purpose and mode of transport. Market research conducted with various tour operators, associations, clubs, and private businesses in the tourism industry that would be affected by the Trail of the Great Bear lead to the following implications by segment:

3.4.5.2 Geographic Origin

- Western Canadians/Americans are not likely to travel the whole route
  - trend towards short distance travel
  - people taking shorter trips at more frequent times during the year
  - travel long distances to access the Trail initially;
- North American markets travel primarily by private automobile. The purpose of travel is typically for recreation, vacation and social reasons. The Trail should incorporate these underlying motivations in the promotional material for corridor loop tours;
- Research on comparable scenic corridors reveals that most successful trails are located close to high density population areas (i.e. The New York Seaway Trail). These areas draw on the regional markets in the short term to support the concept in its initial phases. Although Trail of the Great Bear lies further away from major metropolitan areas, its remoteness may be used as part of its appeal given the trend towards ecotourism and "off the beaten path" destinations.
- The following reasons were cited as rationale for the development of the Trail of the Great Bear:
  - Family pleasure driving is one of America's most popular recreational pursuits;

  - The rapid growth of both urban and metropolitan populations increases the need for people to "escape the urban workplace" to open-space resource areas for outdoor recreation and leisure;

  - A new tourism product such as this could generate substantial economic benefits to Alberta and Montana through increased tourism flow to the corridor area.

- Tour operators who were contacted indicated that tourism services such as food outlets and hotels would be required. Some of these services may require improvement along the Trail.

3.4.5.3 Trip Purpose

- Tour groups must have clearly identifiable themes and major attractions to draw them to various nodes along the Trail.

This market segment addressed the following concerns for the Trail:

- Require advance information as well as promotional material through visitor information services;
- Require clear directional/informational signage both enroute and at key nodes/gateways;
- Require easy access to the Trail within short distances and linkage to major attractions;
- Require interpretive services along the route to educate tourists about existing cultural, historic and natural resources;
- Short getaway market is growing, but requires more established tourist services (i.e. quality restaurants, hotels, gas stations);

- Special interest groups are drawn to the natural resources en route, therefore the backcountry, quiet areas should be preserved for these groups;

- Trail of the Great Bear should be promoted in loop segments (i.e. loop tours) along the major route to meet the needs for short distance travel under growing time constraints (i.e. extended weekend trips);

- In order to meet these requirements, various committees should be appointed to fulfill specific action steps (see implementation/marketing strategy section of report).

3.4.5.4 Mode of Transport

- Access to attractions, services and routes is of utmost importance, therefore these tourist services must be easily accessible and available en route;

- Services such as scenic outlooks, road-side pull-offs, gas stations and picnic areas are required along the Trail at frequent intervals;

- Destination tourists seek the most direct routes to their end destination, therefore they may travel the same route twice along the Trail if it is the fastest, most developed roadway. Loop tours, then, should not be inhibited from using the same route for return travel.

- Recreational vehicles, camp trailers and truck campers are an important part of American recreational experience (10% of Americans own recreational vehicles), therefore serviced campgrounds will be required;

- Rental recreational vehicles require drop-off and pick-up points at major gateways both to and within the Trail of the Great Bear;

- Motor coach tours have severe time constraints since they are schedule oriented, thus motor coach tours need direct routes to major attractions and/or short loop tours from key nodes;

- Fly-drive market requires good access to gateways within a reasonable distance from airports;

- Motor coach tours suggest that an additional supply of accommodation, services and facilities are required during peak season. The national parks are already at full capacity during the summer months.

3.5 ROUTE IDENTIFICATION

The groundwork for route identification began with the resources and assessment inventory phase, initiated in July 1989.

From analysis of this inventory and assessment, during a consultants' workshop, it was determined that the most reasonable way of presenting the information was by segments of highway. On this basis, the study area was divided into 35 " principal route segments" stretching between Banff and Yellowstone National Parks.

At this time, the consultants eliminated 16 route segments (Other Route Segments) from detailed review due to limited significant natural or cultural/historic resources and/or because adjacent segments were overwhelmingly rich in resources.

Each route segment was inventoried and assessed for three major resource areas:

- Natural Resources (wildlands, wildlife and landscape)
- Cultural and Historic Resources
- Tourism Resources (accommodations, food and beverage, visitor services, recreational facilities and services, retail facilities, commercial attractions/special events and infrastructure).

Only those resources that are most significant, or potentially significant from a tourism perspective were included.

The inventory and assessment was then divided into three major areas:

- Principal route segments;
- Other route segments;
- External gateways.

The consulting team met to discuss the inventory and assessment and to determine a preliminary proposed corridor. Selection was made by determining which segments were strongest in the following criteria:

- scenic touring quality
- good road conditions for touring
- existing four season utilization
- access to natural resources
- capability of natural resources to handle increased use
- access to cultural/historic resources
- capability of cultural/historic resources to handle increased use
- access to primary services (food, gas, accommodation)
- existing tourism benefits
- potential tourism benefits
- uniqueness in North America or the world
- part of a system connecting Yellowstone National Park to Banff National Park.

Input from stakeholders, who had indicated an interest in participating in the study, was obtained by sending them surveys with questions on various matters concerning the proposed corridor and a map of the preliminary proposed corridor.

The information and opinions gathered from the surveys were presented to all the consultants and the Steering Committee. The Steering Committee then met in July 1990, to finalize the proposed corridor, utilizing the information presented to them and taking into consideration ideas and concerns brought forth from the stakeholders. The result was a proposed corridor altered somewhat from the preliminary proposed corridor.

The Trail of the Great Bear includes a main route, seasonal alternative routes and connecting routes.

The main routes include route segments which meet the full or essential criteria and are congruent with the philosophy behind the concept of the Trail of the Great Bear, while also responding to the practical realities of road systems and tourist services. They also permit the development of the corridor with minimum requirements for infrastructure, yet provide opportunities for development of economically viable tourism attractions and services in both Montana and Alberta.

Seasonal alternate routes are defined in the same manner as the main routes and essentially meet the same criteria. The exception is that these routes may not be accessible to travel on a year round basis or may provide an alternate route for a main route that experiences periodic winter closures.

Connecting routes are those which either connect a gateway to the Trail of the Great Bear or provide access to a significant resource off the route.

APPENDIX I

ECONOMIC IMPACT MODEL

TRAIL OF THE GREAT BEAR

APPENDIX I

ECONOMIC IMPACT MODEL

ECONOMIC IMPACT ANALYSIS

Analysis of the economic impact of the Trail of the Great Bear can be completed in general terms according to accepted practices for this type of study. Detailed impact analysis would require detailed regional input-output tables, information on regional leakages, and detailed knowledge of construction costs, staffing costs, visitor expenditures and other expenditures in the area.

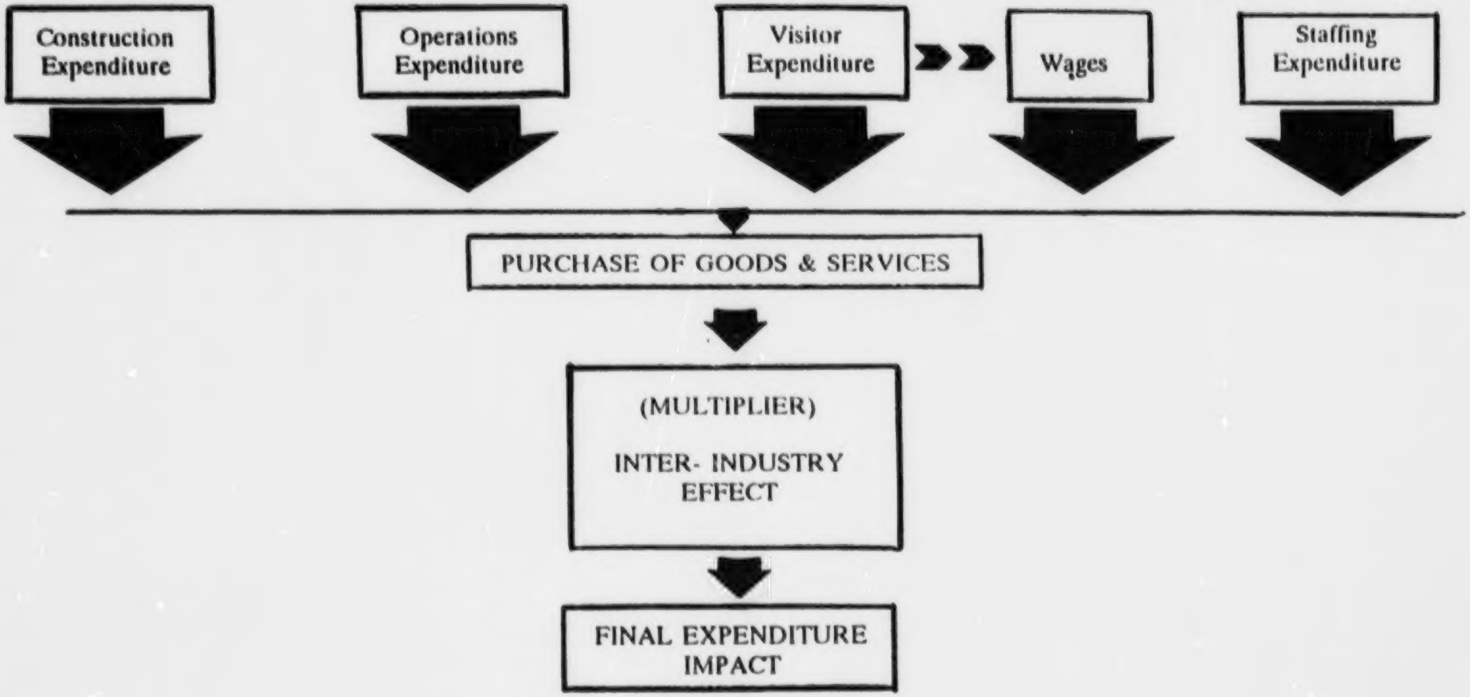
A model of how economic impact is generated forms the basis of any economic impact estimate. The conceptual basis and rationale of the economic impact model used here is borrowed from economic base theory. The proposed Trail of the Great Bear Corridor will attract expenditures in the study region. Thus income enters the region, which implies the highway is part of the regional export base. That is to say the highway "exports" a tourism service to the public in return for revenue which represents an injection of new income into the region. Exhibit I on the following page illustrates the economic impact model.

The direct expenditure is called "first round" spending. Direct impacts represent the initial value of goods and services purchased by travellers. This first round of spending in the region induces additional rounds of spending in the economy. Each time a transaction is made, additional impacts result from income being generated and relocated, and labour employed. The sum of all rounds constitutes the economic impact of the Trail of the Great Bear.

A second fundamental conceptual element of the model involves the concept of LEAKAGES. After the first round of spending occurs directly along the highway, income begins to "leak" from the region.

The effect of adding these sequential rounds of economic impact is called the INTERINDUSTRY MULTIPLIER EFFECT. A factor (called a multiplier) is used to estimate the impact of successive rounds of spending. For the purposes of this analysis, the Alberta

EXHIBIT I
TRAIL OF THE GREAT BEAR
SCENIC TOURING CORRIDOR
ECONOMIC IMPACT MODEL.


Construction Expenditure
Operations Expenditure
Visitor Expenditure
Wages
Staffing Expenditure
PURCHASE OF GOODS & SERVICES
(MULTIPLIER)
INTER- INDUSTRY EFFECT
FINAL EXPENDITURE IMPACT

Source: Adapted from the Office of Institutional Analysis, University of Calgary, 1987 multipliers used are acceptable industry average multipliers based on the 1979 Input-Output tables as published by the Alberta Bureau of Statistics, (most recent tables) and on Statistics Canada Multipliers. The multipliers used in Montana were derived from Implan, a United States based input/output model, and are based upon 1988 non-resident travel expenditures. The multipliers presented herein are total multipliers in ratio form with leakages.An example might best illustrate both multipliers and leakages.

Services associated with the highway receives, let us say, $100 in revenue from visitors. The direct impact is $100. However, it uses $40 of the income to purchase supplies and services from outside the region which are required in order to generate the $100. Thus the first round impact inside the region is $60, while the leakage outside the region is $40. Alberta and Montana, by this argument, retains the full $100. The multipliers used in this analysis have already accounted for leakages.

Three categories of first round economic impact are relevant:

- Construction Expenditures
- Operations Expenditures
- Visitor Expenditures

Expenditures in the first round of impact are used to purchase goods and services in the local community and elsewhere in Alberta or Montana. The interindustry multiplier effect then acts to increase the total economic impact of the development. Each expenditure category will be considered separately in the following sections.

In this analysis the assessment of employment impact has been restricted to net new employment created by the development of the scenic highway and its related services.

Also included, as part of the highway economic impact statement are the development of tourism services and facilities along the highway.

These figures will be added to the figures in the text for the purpose of calculating economic impact.

a. Alberta Economic Impacts

Income and Employment Impacts

The impact estimates which follow are based upon available estimates at the time of writing. Economic impact multipliers have been sourced from the Alberta Bureau of Statistics and tested against the broad ratios generated by Tourism Canada.

Construction

Income Impact of Construction Expenditures

The cost of developing the Trail of the Great Bear in Alberta and its associated services has been estimated to be $16,989,130 as detailed in Table II-12 of the report - Section Two.

For assessment purposes, it has been assumed that an alternative or substitute investment in Alberta would not have been made in the next few years. Thus, the construction impact is a one-time impact and a net new injection into the Alberta economy.

Table 1 outlines the estimated construction impact on Alberta.

TABLE 1

INCOME IMPACT OF PROJECTED CONSTRUCTION EXPENDITURES
TRAIL OF THE GREAT BEAR
(1990 CDN. DOLLARS)

	Alberta	
Net Construction Expenditure	$16,989,130	
Construction Labour Income	$ 5,436,522	
Other Construction Income Impact	$11,552,608	
Total Direct Impact	$16,989,130	
Indirect Impact (Multiplier Effect)	$11,042,935	
TOTAL INCOME IMPACT		$28,032,065

* Percentage of total cost for Construction Labour:	32%
* Percentage of total cost for Other Construction:	68%
* Multiplier (Indirect impact):	0.65

Source: Pannell Kerr Forster research

The total one-time construction impact on Alberta is estimated to be $28 million (1990 Cdn. dollars).

The above figures are derived from the net construction expenditures using conservative industry average ratios. The construction labour force is estimated to account for 32% of the total cost. It is assumed that the entire labour force is from Alberta.

The "other construction impact" category, accounting for 68% of the total cost for Alberta includes the cost of materials for construction. Necessary materials will, wherever possible, be acquired in Alberta.

The income multipliers of 1.65 for Alberta have been sourced from the Alberta Bureau of Statistics.

Employment Impact of Construction Expenditures

Table 2 illustrates the expected employment impact of construction using construction industry norms for labour income, hourly wages and person-hours per year.

The total estimated construction employment effect in Alberta is 252 person years.

Operations

Income Impact of Operating Expenditures

Operating expenditures refers to all operating costs. These costs are estimated to be at least $300,000 per year for the highway and an additional $2,325,000 for the services for a conservative total of $2,625,000 in direct operating costs as detailed in Section Two of the report.

TABLE 2

EMPLOYMENT IMPACT OF CONSTRUCTION EXPENDITURES
TRAIL OF THE GREAT BEAR
(1990 CDN. DOLLARS)

	Alberta
Construction Labour Income	$5,436,522
Direct Person Hours (at $18/hour)	302,029
Indirect Person Hours (multiplier)	151,014
Total Person Hours	453,043
TOTAL PERSON YEARS OF EMPLOYMENT	252

* Person Wage Per Hour:	$ 18.00
* Multiplier (Indirect impact):	.50
* Hours Per Person Year:	1,800.00

Source: Pannell Kerr Forster research

Operating expenditures involve payments for highway maintenance supplies, restaurant and motel operating costs, insurance, marketing, and other miscellaneous costs.

The estimated annual income impact of operations is expected to be approximately $3.4 million for Alberta. The income effect of operating expenditures is shown on Table 3.

Employment Impact of Operating Expenditures

The employment impact from operating expenditures can be estimated if certain assumptions are accepted:

- payments to labour account for 37% of all operating expenditures
- most operating jobs are service sector jobs and average wages are $10.00 per hour instead of $18 for construction labour.

Table 4 records the results. The estimated annual employment impact of highway and service operations is 70.2 person years in Alberta.

Visitor Expenditures

Income Impact of Visitor Expenditures

The proposed Trail of the Great Bear will provide access to numerous historic, cultural and recreational opportunities and will facilitate the development of tourism support services and facilities. It will therefore induce destination visits.

TABLE 3

INCOME EFFECT OF OPERATING EXPENDITURES
TRAIL OF THE GREAT BEAR
(1990 CDN. DOLLARS)

	Alberta
Direct Operating Expenditure	$2,625,000
Indirect Effect (Multiplier)	$ 787,500
TOTAL	$3,412,500

* Multiplier (Indirect impact): 0.30

Source: Pannell Kerr Forster research

TABLE 4

EMPLOYMENT IMPACT OF OPERATING EXPENDITURES
TRAIL OF THE GREAT BEAR
(1990 CDN. DOLLARS)

	Alberta
Direct Operating Expenditure	$2,625,000
Estimated Labour Expenditure	$ 971,250
Labour Person Hours	97,125
Labour Person Years (Direct)	54.0
Indirect Effect (Multiplier)	16.2
TOTAL EMPLOYMENT IMPACT	70.2

* Percentage of operating expenditure for labour expenditure: 37%
* Person wage per hour: $10.00
* Hours per person years: 1,800.00
* Multiplier (Indirect impact): 0.30

Source: Pannell Kerr Forster research

The induced impact of visitor expenditures cannot be estimated here. The induced effect of visitor expenditures is a secondary benefit. This effect is the consumption spending of the wage and salary income directly generated by the travel expenditures on goods and services produced in the area.

If we assume the average visitor expenditure in the region, in addition to expenditures along the highway, is $31.18 per visitor day, the income effect is an additional $51.9 million. This is the direct income effect. (Refer to Section Two of the report.)

Table 5 sets out the assumptions and the calculations supporting a visitor expenditure impact of $83.1 million on the Alberta economy.

TABLE 5

DIRECT AND INDIRECT INCOME IMPACT OF VISITOR EXPENDITURES TRAIL OF THE GREAT BEAR (BASED ON 1,666,347 VISITOR DAYS PER ANNUM) (1990 CDN. DOLLARS)

	Alberta
Direct Annual Impact	$51,956,699
Indirect Effect (Multiplier)	$31,174,019
TOTAL INCOME IMPACT	$83,130,718

*	Number of visitor days:	1,666,347
*	Direct annual impact per capita:	$31.18
*	Multiplier Effect (Indirect impact):	0.6

Source: Pannell Kerr Forster research

Employment Impact of Visitor Expenditures

Most of the employment generated by induced visitor expenditures would be service sector jobs. If we assume that 40% of the total visitor expenditures is paid out in service sector income, we can estimate the employment impact. Table 6 illustrates the employment effect.

The Alberta impact is estimated to be 1,732 person-years of employment per year.

Total Economic Impact

The one time construction impact of developing the Trail of the Great Bear in Alberta is expected to be $28.0 million to Alberta. It will generate 252 person-years of construction employment for Alberta.

Total Annual Income Impact

The total estimated annual income effect is outlined in Table 7. A total annual income of $86.5 million in Alberta is expected to be generated by the highway and service operation.

Total Annual Employment Impact

The annual total employment impact is illustrated in Table 8.

The proposed highway is expected to create 1,802 person years of employment annually for Albertans.

TABLE 6

EMPLOYMENT IMPACT OF VISITOR EXPENDITURES
TRAIL OF THE GREAT BEAR
(ANNUAL, PERSON YEARS)
(1990 CDN. DOLLARS)

	Alberta
Total Direct Visitor Expenditures	$51,956,699
Service Sector Employment Income	$20,782,680
Person Hours of Employment (Direct)	2,078,268
Indirect Effect (Hrs.) (Multiplier)	1,039,134
TOTAL EMPLOYMENT IMPACT (HOURS)	3,117,402
TOTAL ANNUAL EMPLOYMENT IMPACT (PERSON YEARS)	1,732

* Number of visitors:	1,666,347
* Direct annual impact per capita:	$31.18
* Percentage of visitors expenditures for labour:	40%
* Person wage per hour:	$10
* Multiplier effect (Indirect impact):	0.5
* Hours per person year:	1,800

Source: Pannell Kerr Forster research

TABLE 7

TOTAL ANNUAL INCOME IMPACT TRAIL OF THE GREAT BEAR (1990 CDN. DOLLARS)

	Alberta
From Operation Expenditure	$ 3,412,500
From Visitor Expenditure in the Touring Area	$83,130,718
TOTAL ANNUAL INCOME IMPACT	$86,543,218

Source: Pannell Kerr Forster research

TABLE 8

TOTAL ANNUAL EMPLOYMENT IMPACT TRAIL OF THE GREAT BEAR

	Alberta
From Operation Expenditure	70.2
From Visitor Expenditure in the Touring Area	1,732.0
TOTAL ANNUAL EMPLOYMENT IMPACT (PERSON YEARS)	1,802

Pannell Kerr Forster research

b. Montana Economic Impacts

Income and Employment Impacts

The impact estimates which follow are based upon available estimates at the time of writing. Economic impact multipliers have been sourced from the Montana Bureau of Business as well as from the Institute of Tourism Research. A general income and employment multiplier was applied in the following analysis.

Construction

Income Impact of Construction Expenditures

The cost of developing the Trail of the Great Bear in Montana and its associated services has been estimated to be $25,720,040 Cdn. ($21,982,940 U.S.) detailed in Table II-17 of the report - Section Two.

For assessment purposes, it has been assumed that an alternative or substitute investment in Montana would not have been made in the next few years. Thus we assume the construction impact is a one-time impact and a net new injection into the Montana economy.

Table 9 outlines the estimated construction impact on Montana.

TABLE 9

INCOME IMPACT OF PROJECTED CONSTRUCTION EXPENDITURES TRAIL OF THE GREAT BEAR (1990 DOLLARS)*

Montana

	Cdn. $	U.S. $
Net Construction Expenditure	$25,720,040	$21,196,581
Construction Labour Income	$10,288,016	$ 8,793,176
Other Construction Income Impact	$15,432,024	$12,403,405
Total Direct Impact	$25,720,040	$21,196,581
Indirect Impact (Multiplier Effect)	$25,720,040	$21,196,581
Total Income Impact	$51,440,880	$42,393,162

* Percentage of total cost for Construction Labour:	40%
* Percentage of total cost for Other Construction:	68%
* Multiplier (Indirect impact):	1.00

* U.S. conversion rate is 1.17 at time of writing.

Source: Pannell Kerr Forster research

The total one-time construction impact on Montana is estimated to be $51 million Cdn. or $42.4 million U.S.

The above figures are derived from the net construction expenditures using conservative industry average ratios. The construction labour force is estimated to account for 40% of the total cost. It is assumed that the entire labour force is from Montana.

The "other construction impact" category, accounting for 60% of the total cost for Montana and includes the cost of materials for construction. Necessary materials will, wherever possible, be acquired in Montana.

The income multipliers of 2.00 for Montana have been sourced from the Montana Bureau of Business.

Employment Impact of Construction Expenditures

Table 10 illustrates the expected employment impact of construction using construction industry norms for labour income, hourly wages and person-hours per year.

The total estimated construction employment effect in Montana is 699 person years.

Operations

Income Impact of Operating Expenditures

Operating expenditures refers to all operating costs. These costs are estimated to be at least $660,000 per year for the highway and an additional $2,870,000 for the services for a conservative total of $3,530,000 or $3,017,094 U.S. as detailed in Section Two of the finai report.

TABLE 10

EMPLOYMENT IMPACT OF CONSTRUCTION EXPENDITURES TRAIL OF THE GREAT BEAR (1990 CDN. DOLLARS)

	Montana
Construction Labour Income	$10,288,016
Direct Person Hours (at $18/hour)	571,556
Indirect Person Hours (multiplier)	685,868
Total Person Hours	1,257,424
TOTAL PERSON YEARS OF EMPLOYMENT	699

*	Person Wage Per Hour:	$ 18.00
*	Multiplier (Indirect impact):	1.20
*	Hours Per Person Year:	1,800.00

Source: Pannell Kerr Forster research

Operating expenditures involve payments for highway maintenance supplies, restaurant and motel operating costs, insurance, marketing, and other miscellaneous costs.

The estimated annual income impact of operations is expected to be approximately $7.1 million Cdn. or $6.0 million U.S. for Montana. The income effect of operating expenditures is shown on Table 11.

Employment Impact of Operating Expenditures

The employment impact from operating expenditures can be estimated if certain assumptions are accepted:

- payments to labour account for 37% of all operating expenditures
- most operating jobs are service sector jobs and average wages are $10.00 (Cdn.) per hour instead of $18 (Cdn.) for construction labour.

Table 12 records the results. The estimated annual employment impact of highway and service operations is 130.6 person years in Montana.

Visitor Expenditures

Income Impact of Visitor Expenditures

The proposed Trail of the Great Bear will provide access to numerous historic, cultural and recreational opportunities and will facilitate the development of tourism support services and facilities. It will therefore induce destination visits.

TABLE 11

INCOME EFFECT OF OPERATING EXPENDITURES TRAIL OF THE GREAT BEAR (1990 DOLLARS)

	Montana Cdn. $	U.S. $
Direct Operating Expenditure	$3,530,000	$3,017,094
Indirect Effect (Multiplier)	$3,530,000	$3,017,094
TOTAL	$7,060,000	$6,034,188

* Multiplier (Indirect impact): 1.00

Source: Pannell Kerr Forster research

TABLE 12

EMPLOYMENT IMPACT OF OPERATING EXPENDITURES TRAIL OF THE GREAT BEAR (1990 DOLLARS)

	Montana
Direct Operating Expenditure	$3,530,000
Estimated Labour Expenditure	$1,306,100
Labour Person Hours	130,610
Labour Person Years (Direct)	72.6
Indirect Effect (Multiplier)	58.0
TOTAL EMPLOYMENT IMPACT	130.6

*	Percentage of operating expenditure for labour expenditure:	37%
*	Person wage per hour:	$10.00
*	Hours per person years:	1,800
*	Multiplier (Indirect impact):	0.80

Source: Pannell Kerr Forster research

The induced impact of visitor expenditures cannot be estimated here. The induced effect of visitor expenditures is a secondary benefit. Induced impacts are the result of the increased earnings of employees in the supplying businesses.

If we assume the average visitor expenditure in the region, in addition to expenditures along the highway, is $25.44 ($21.74 U.S.) per visitor day, the income effect is an additional $30.7 ($26.3 U.S.) million. This is the direct income effect. (Refer to Section Two of the report).

Table 13 sets out the assumptions and the calculations supporting a visitor expenditure impact of $61.4 million Cdn. or $52.5 million U.S. million on the Montana economy.

TABLE 13

DIRECT AND INDIRECT INCOME IMPACT
OF VISITOR EXPENDITURES
TRAIL OF THE GREAT BEAR
(BASED ON 1,207,645 VISITOR DAYS PER ANNUM)
(1990 DOLLARS)

	Montana	
	Cdn. $	U.S. $
Direct Annual Impact	$30,722,489	$26,258,537
Indirect Effect (Multiplier)	$30,722,489	$26,258,537
TOTAL INCOME IMPACT	$61,444,978	$52,517,074

*	Number of visitor days:	1,207,645	
*	Direct annual impact per capita:	$25.44	$21.74
*	Multiplier Effect (Indirect impact):	1.00	

Source: Pannell Kerr Forster research

Employment Impact of Visitor Expenditures

Most of the employment generated by induced visitor expenditures would be service sector jobs. If we assume that 40% of the total visitor expenditures is paid out in service sector income, we can estimate the employment impact. Table 14 illustrates the employment effect.

The Montana impact is estimated to be 1,228.9 person-years of employment per year.

Total Economic Impact

The one time construction impact of developing the Trail of the Great Bear in Montana is expected to be $51 million Cdn. or $42.4 million U.S. to Montana. It will generate 699 person-years of construction employment for Montana.

Total Annual Income Impact

The total estimated annual income effect is outlined in Table 15. A total annual income of $68.5 million Cdn. or $58.5 million U.S. in Montana is expected to be generated by the highway and service operation.

Total Annual Employment Impact

The annual total employment impact is illustrated in Table 16.

The proposed highway is expected to create 1,359.5 person years of employment annually for Montana residents.

TABLE 14

EMPLOYMENT IMPACT OF VISITOR EXPENDITURES
TRAIL OF THE GREAT BEAR
(ANNUAL, PERSON YEARS)
(1990 CDN. DOLLARS)

	Montana
Total Direct Visitor Expenditures	$30,722,489
Service Sector Employment Income	$12,288,996
Person Hours of Employment (Direct)	$ 1,228,900
Indirect Effect (Hrs.) (Multiplier)	$ 983,120
TOTAL EMPLOYMENT IMPACT (HOURS)	$ 2,212,019
TOTAL ANNUAL EMPLOYMENT IMPACT (PERSON YEARS)	1,228.9

*	Number of visitors:	$1,207,645
*	Direct annual impact per capita:	$25.44
*	Percentage of visitors expenditures for labour:	40%
*	Person wage per hour:	$10
*	Multiplier effect (Indirect impact):	0.8
*	Hours per person year:	1,800

Source: Pannell Kerr Forster research

TABLE 15

TOTAL ANNUAL INCOME IMPACT TRAIL OF THE GREAT BEAR (1990 DOLLARS)

	Montana	
	Cdn. $	U.S. $
From Operation Expenditure	$ 7,060,000	$ 6,034,188
From Visitor Expenditure in the Touring Area	$61,444,978	$52,517,074
TOTAL ANNUAL INCOME IMPACT	$68,504,978	$58,551,262

Source: Pannell Kerr Forster research

TABLE 16

TOTAL ANNUAL EMPLOYMENT IMPACT TRAIL OF THE GREAT BEAR

Montana	
From Operation Expenditure	130.6
From Visitor Expenditure in the Touring Area	1,228.9
TOTAL ANNUAL EMPLOYMENT IMPACT (PERSON YEARS)	1,359.5

Source: Pannell Kerr Forster research

APPENDIX II

TECHNICAL TERMS AND DEFINITIONS

TRAIL OF THE GREAT BEAR

APPENDIX II

TECHNICAL TERMS AND DEFINITIONS

Several terms require definitions to ensure common understanding of the report.

Seasonal Route Segments

Route segments which are closed in winter or offer an alternative to route segments closed in winter.

Theme

Possible interpretive storylines and/or messages which are appropriate to the Trail of the Great Bear concept to specific natural or cultural resources.

Site

A parcel of land of variable size with one or more significant natural or cultural resource features.

Gateway

An area with a concentration of significant visitor services which may include major airports and transportation facilities. Gateways are major access and transition points within and into the corridor.

APPENDIX III

NATURAL, CULTURAL AND HISTORIC RESOURCE THEME SUMMARY

TRAIL OF THE GREAT BEAR

APPENDIX III

NATURAL, CULTURAL AND HISTORIC RESOURCE THEME SUMMARY

NATURAL RESOURCE THEME SUMMARY

The following is a complete listing of the major natural resource themes for the Trail of the Great Bear. They are arranged alphabetically under the following categories: Natural Regions, Wildlife, Exceptional Habitats and Landforms. It should be remembered that each major theme often has a number of sub-themes.

Natural Regions

Broad Valley Rockies - The Broad Valley Rockies occupy a significant portion of central Montana between the Columbia and Northern Rockies and the Yellowstone Rockies. It is a distinctive area of high, isolated mountain ranges separated by broad, smooth-floored valleys. While there are some glaciated higher peaks which exceed 10,000 feet in elevation, there are many more subdued lower elevation ranges. They are comprised of faulted crystalline and sedimentary rocks. Vegetation is characteristically more open and drier than in the Columbia Rockies and includes species like Rocky Mountain juniper and Ponderosa pine which are not common northward into the Northern Rockies. Alpine areas tend to be dry and rocky while the broad valleys have extensive sagebrush and grassland interrupted by bands of riparian cottonwood and willow vegetation.

Some of the most significant examples of this natural region are found along the Pintler Scenic Highway, Gates of the Mountains Wilderness northeast of Helena, and the Middle Mountains-Tobacco Roots.

Columbia Rockies - The rugged Columbia Rockies are glaciated mountains found in the Selway-Bitterroot Wilderness and along the west side of the Continental Divide in the Bob Marshall Wilderness Complex and Glacier National Park. There is more precipitation than in the other mountains and this is reflected in the luxuriant and varied natural vegetation, including several forest trees typical of the Pacific Northwest -- Douglas fir, hemlock, grand fir, western white pine, western red cedar and western larch. Alpine areas display incredibly lush flower blooms. These mountains are largely sedimentary rocks with some underlying igneous and volcanic types.

The most significant examples of this natural region are found in the western portion of Glacier National Park and the Swan River Valley and adjacent portions of the Bob Marshall Wilderness Complex and Mission Mountains Wilderness.

Foothills - North of Waterton, the Plains no longer merge directly with the Rocky Mountains. The intervening sedimentary rock has been compressed and folded into ridges known as Foothills. These strongly rolling hills contain a variety of open grassland, willow shrubbery, aspen woodland, dense coniferous forests and rock outcrops.

The finest examples of this feature occur in the area between Chapel Butte and Longview, the most outstanding areas being the Whaleback Ridge and Porcupine Hills.

Northern Rockies - The rugged Northern Rockies are glaciated mountains extending along the Rocky Mountain Front Ranges along the eastern side of the Continental Divide from the Bob Marshall Wilderness Complex north to Banff National Park. With the exception of a few areas, most of the rocks are uplifted sedimentary strata. Forests include dry montane types dominated by Douglas fir and lodgepole pine as well as higher elevation Engelmann spruce, subalpine fir, whitebark pine and alpine larch. Alpine areas tend to be drier than those in the lush Columbia Rockies.

The best examples of this natural region in the corridor are found along the Rocky Mountain Front in Montana and in Waterton Lakes National Park, the South Castle, Beehive Natural Area, Kananaskis Country, and Banff National Park in Alberta.

Rocky Mountain Front - In this report, the term Rocky Mountain Front refers to the Front Ranges of the Northern Rockies and the immediately adjacent Plains in the area along the east side of the Bob Marshall Wilderness Complex north to the Waterton area.

This is an extremely productive wildlife area with stunning scenery. The best examples lie adjacent to Waterton Lakes National Park, and on the Hearte Butte Loop, the Sun River Game Reserve and the Pine Butte and Teton Marsh. The Browning-Wolf Creek route is crucial to accessing this resource and travels within visual range of the Rocky Mountain Front over most of its length.

Continental Divide - While not a visible feature, this theme is important in defining those rivers which flow westward into the Pacific and those which flow east either into Hudson Bay or the Caribbean.

Rocky Mountain Trench - The Rocky Mountain Trench is the broad intermountain valley occupied by the North Fork of the Flathead River and Flathead Lake.

Yellowstone Rockies - The rugged Yellowstone Rockies include the Absaroka, Beartooth, Madison, Gallatin and Centennial Ranges in the vicinity of Yellowstone National Park. There are extensive exposures of volcanic and ancient sedimentary strata. These ranges have extensive lands above 9,000 feet. Forests are typically dry montane types consisting mainly of Douglas fir, lodgepole pine, Engelmann spruce and subalpine fir. Alpine areas are drier than those of the Columbia Rockies.

The finest examples of this landscape lie along the Beartooth Scenic Highway, Chief Joseph Scenic Highway, and in the Lee Metcalf Wilderness and the Absaroka-Beartooth Wilderness.

Wildlife

Blue-ribbon Trout Streams - In the late 1950's, Montana biologists developed a classification scheme for rating the value of Montana's trout streams. Class 1 streams came to be known as "blue-ribbon", named after the first prizes awarded at county fairs. These streams support a variety of salmon fish which are indicative of the high quality of these streams.

Some of the best examples are the North Fork of the Oldman, the Bow and the Crowsnest Rivers in Alberta and Rock Creek, portions of the Missouri, and the Flathead, Bitterroot, Blackfoot, Madison and Yellowstone in Montana.

Large Mammals - The Trail of the Great Bear is endowed with numerous areas which support an abundance and variety of large and easily viewable mammals characteristic of western North America: grizzly bear, mountain goat, bighorn sheep, elk, mule deer, moose and pronghorn.

Major accessible viewing sites and some of the numerous large mammals which are viewable in each include Banff National Park, the Wind Valley and Lac des Arcs: elk and bighorn sheep; Peter Lougheed Provincial Park: bighorn sheep and mountain goat; the Whaleback: mule deer and elk; Waterton Lakes National Park: mule deer, elk, bighorn sheep, grizzly bear; Glacier National Park: mountain goat, grizzly bear; bighorn sheep, the Rocky Mountain Front (Sun River and Pine Butte/Teton Marsh): elk, mule deer, moose, grizzly bear, bighorn sheep; the Blackfoot-Clearwater Wildlife Management Area: elk and deer; the area surrounding the Pintler Scenic Highway: bighorn sheep and mountain goat; National Bison Range: elk, bighorn sheep, bison, pronghorn, and deer; Red Rock Lakes National Wildlife Refuge: pronghorn, moose, deer, elk; and Yellowstone National Park: elk, bison, deer, moose and pronghorn. All the wilderness areas offer numerous opportunities to observe a wide variety of large mammals in a back-country setting.

Exceptional Habitats

Foothills Parkland - The aspen parkland vegetation of northwestern Montana and adjacent southwestern Alberta is unique in North America. It has developed largely on glacial moraines. Vegetation includes lush aspen woodland and foothills fescue grassland both of which are characterized by impressive spring flower blooms. A number of pothole type wetlands, marshes and wet meadows occur in depressions. These are important for a variety of waterfowl including nesting Trumpeter Swans and Sandhill Cranes.

The best examples occur on the Blackfeet Indian Reservation in Montana and in Waterton Lakes National Park and the immediately adjacent areas to the north and east in Alberta, although some areas outside the park have been degraded in places by heavy cattle grazing and clearing.

Old-growth Forests - With continued clearing of prime forest resources, magnificent old-growth forests are becoming scarce. These woodlands support a unique combination of wildlife which is not found in younger stands.

The most important old-growth areas identified along the Trail of the Great Bear are those found in the Glacier National Park and Swan valley areas of Montana and the Beehive Natural Area of Alberta.

Riparian Habitats - Extensive cottonwood forests and associated willow shrubbery and back channel wetlands provide some of the most productive bird habitat in drier grassland and sagebrush regions. They are also among the most threatened habitats in arid and semi-arid regions around the world. Rivers along the Trail of the Great Bear have several natural and diverse stretches of extensive riparian habitat.

Some of the best examples are found along the Oldman River in the vicinities of Fort Macleod and Lethbridge, along the Bitterroot River south of Missoula and in the Missouri River headwaters.

Wetlands - Wet meadows, marshes and open water provide important habitat for numerous species of viewable marsh birds, waterfowl and shorebirds.

The most significant wetlands along Trail of the Great Bear are found at Red Rock Lakes, Freezeout Lake and the Benton Lake and Ninepipe National Wildlife Refuges.

Landforms

Batholiths - A batholith is a large mass of granitic rock. These often weather into intriguing formations. The most extensive and well-formed examples along Trail of the Great Bear are found at Homestake Pass.

Canyons - Canyons are scenic steep-walled stream valleys which expose a variety of sometimes colourful rock strata. The most spectacular examples are the Grand Canyon of the Yellowstone and Beartrap Canyon along the Madison River.

Earthquakes - Evidence of earthquakes is very localized along the Trail of the Great Bear. The best example is found in the Earthquake Lake area west of Yellowstone National Park.

Ice Caves - Ice caves are rare geologic phenomena. The only one identified along Trail of the Great Bear is at Plateau Mountain and it is considered to be of international significance.

Intrusive Dikes - These are bodies of igneous rock formed when molten rock intruded into a fracture. They often form intriguing and steep-sided narrow rock walls when intruded into softer sedimentary strata. There are examples along the Yellowstone (Devil's Slide) and Missouri River valleys.

Laccoliths - A laccolith is an igneous intrusion formed when a blister of molten rock was injected between layers of sedimentary rock. Subsequent erosion reduces these to flat-topped buttes. Excellent examples occur just west of Great Falls.

Lakes - Large lakes are rare along the Trail of the Great Bear. The largest are the Flathead and Yellowstone Lakes. These provide important fish habitat as well as nesting and staging areas for waterfowl and fish-eating birds.

Landslides - While major landslides are rare along the Trail of the Great Bear, two of the best examples in North America are found at Earthquake Lake and the Frank Slide.

Lewis Overthrust - This is a spectacular example of a massive block of older Precambrian rocks being pushed over younger Cretaceous rocks. It is the basis for the distinctive scenery found in northern Montana and extreme southwestern Alberta. A particularly striking example is Chief Mountain.

Limestone Caves - While there are many more undocumented caves, there are only two wet caves, Garrity and Lewis and Clark, which have been identified for use in the area between

Yellowstone and Banff National Park. These have spectacular stalagmite and stalactite formations.

Megablocks - A megablock is a large (up to several km) block of bedrock which has been rafted by glacial action and moved to another location. The older rock of the megablock is now out of the normal geological sequence and sits on top of younger glacial sediments. One of the finest examples of this phenomenon is found west of Lethbridge where a megablock is exposed in the Oldman River Valley wall south of Kipp.

Patterned Ground - Patterned ground is created by freezing and thawing in permafrost areas above timberline. A distinctive variety of stone nets and lines are created. Patterned ground is best developed on flat alpine plateaux like those at Plateau Mountain and on the Beartooth plateau.

Springs - Major springs are rare phenomena along the Trail of the Great Bear. Sometimes there are important wildlife and plant habitats associated with these areas. The two most interesting springs identified are the Many Springs area in Bow Valley Provincial Park and the Giant Springs at Great Falls.

Thermal Features - Thermal features include geysers, fumaroles, hot springs and boiling mud pools. The Yellowstone area is recognized as unique in the world because of the quality, diversity and concentration of these features.

Volcanic Rocks - Volcanic rocks include columnar basaltic rocks, volcanic gravels and petrified forests in volcanic mudflows. They occur extensively in the Yellowstone Rockies, particularly in the Absaroka and Gallatin Ranges. There are scattered occurrences elsewhere in the Crowsnest Pass and portions of the central Montana Broad Valley Rockies such as the significant exposures in the Wolf Creek area.

CULTURAL AND HISTORIC RESOURCE THEME SUMMARY

Human beings have been integral components of the diverse landscapes and ecosystems of the Trail of the Great Bear since they began to evolve after the end of the last Ice Age some 10,500 years ago. Along the Trail the past flows through the present into the future. Much of the landscape recalls the Buffalo Days of the Native Peoples and first exploration and settlement by non-native peoples. Native and non-native cultural resources are the two principal themes. Each has a number of subthemes which are listed below.

Native Peoples

The theme of Native Peoples, both today and in the past, form a strong unifying link between the Trail's natural and cultural resources. This is a major cultural theme. Most of these lands were once Peigan, Flathead, Kootenai and Stoney tribal territories, whose descendants reside today on various reserves within the region. The Peigan were the last of the Plains tribes to take treaty. The record of their outstanding cultural achievements during the Buffalo Days and the impact of non-native culture and policy on their traditional ways of life are among the most significant in North America.

Traditional Native Culture and Land Use History - Native People culture and land use history extends back at least to the closing millennia of the last Ice Age some 11,000 or more years ago. The various cultures left behind a rich and varied record, studied by archaeologists at many locations along the Trail. Some studies relate to specific sites and subthemes, such as buffalo jumps which are in themselves significant thematic elements, while others relate to more general patterns of traditional Native life. The foothills-mountain interface and adjacent mountain valleys were focal settlement areas. A considerable body of information has been obtained by archaeologists over the last 25 years from digs and surveys in some of these areas, particularly the national parks. This information has generally not yet been interpreted to the public, but should be. Other areas which have not been intensively studied, the Blackfoot and Peigan Reserves, have great potential for study and public interpretation.

Trails - A well defined system of traditional Native trails exists along the Trail of the Great Bear. They serve to articulate movement north and south along the Rockies and between the eastern and western slopes. The most significant of these is the Old North Trail, portions of which are visible along the Trail of the Great Bear.

Buffalo Jumping - The Native Peoples of the Northwestern Plains and adjacent Rocky Mountains, best exemplified by the Blackfoot tribes, developed a highly sophisticated and complex culture centred around the hunting of buffalo. Among the methods used, were the driving of herds of buffalo into traps, the most spectacular of which are the large buffalo jumps. Here the animals were driven over cliffs. The vast majority of jumps are located in the plains and foothills of Alberta and Montana. Many were destroyed by bone miners and arrowhead collectors. Some are protected and developed for public interpretation such as Head-Smashed-In Buffalo Jump Interpretive Centre in Southern Alberta, and the Madison Buffalo Jump in Southwestern Montana.

Chert and Obsidian Mining - In the past, Native Peoples used a limited variety of stones to make their chipped stone tools. Preferred materials and sources were sought and developed as mines. These occur only in certain locations and geological formations. Along the Trail of the Great Bear are some of the largest and most important mines in the Rocky Mountains including Obsidian Cliffs in Yellowstone National Park, and a complex of chert quarries in the Central Montana Rockies. The sites contain a variety of visible mining features capable of public interpretation. None have yet been interpreted.

Spiritual - The Native Peoples' traditional spirituality is intimately linked with other living beings, the landscape and environment in which all of Creation coexist. The Peigan, like peoples everywhere, have a sacred geography with sacred and special places commemorating both sacred cosmological events as well as places for continuing personal, familial, and tribal spiritual renewal. Among the principal of their sites is Chief Mountain, a sacred mountain to the Peigan People. Rock art and sacred circles-medicine wheels also occur along the Trail. Some sites are suitable for appropriate spiritually and culturally sensitive interpretation.

Reserve Period - Beginning in the late 1850's, the Native Peoples of the region came into increasing contact with the expanding non-native culture, as American prospectors and settlers expanded westward up the Missouri, and later in the 1870's Canadian settlers and ranchers followed the Northwest Mounted Police into today's Southern Alberta. Treaties were signed and the Natives were confined to reserves of diminishing proportions. Government policy and missionizing activities had a major impact on traditional Native culture. This process is commemorated both in Montana and Alberta by a number of agency and mission sites. Many are in close proximity or on the Trail, and are suitable for interpretive development.

Non-Native People

The Northern Rocky Mountains and adjacent eastern slopes has its own distinct regional North American non-native culture which very much reflects the richness and diversity of the "Last, Best, West" and the ecosystem on which it is based. There are many non-native cultural resource thematic elements, but those which have been selected are most closely related to the Trail.

Exploration and Fur Trade - The region was first explored in the late 1700's and early 1800's by Hudson Bay, Canadian and American fur traders and explorers. The most important expedition was Lewis and Clark's, commemorated at a number of locations in Montana. Additionally, currently under development is the Lewis and Clark Natural History Trail Interpretive Centre in Great Falls. Although the region was rich in fur, the lands were primarily Peigan territory. They discouraged the establishment of posts with the result that the most important fur posts were established on the periphery of Blackfoot territory. Two posts, Fort Connah in the Flathead Valley, and Old Bow Fort on the Bow upstream from Calgary, have potential for interpretive development.

Whiskey Trade - The years 1868-1874 were marked by the establishment of a number of trading posts by American traders. These trading posts were located in today's southern Alberta and were best known for their trade of "whiskey" to the Natives. They had a major negative impact on traditional Native culture and population and were the principal reason the North West Mounted Police were established and marched west in 1874. A number of the posts lie on or in close proximity to the Trail, including the notorious Fort Whoop-Up, near the city of Lethbridge, a replica of which has been developed for interpretation in the city's

Indian Battle Park. The Whiskey Trade is a very significant historical event. Interpretation should be extended to include minor posts and events.

Military and Police "Law and Order" - The bringing of "law and order" to the American and Canadian west, while different in concept and application, in the end had similar consequences for the Native peoples and the interaction with non-native society both north and south of the "Medicine Line". This theme is represented along the Trail, by the principal establishment of the North West Mounted Police, Fort Macleod, and one of many U.S. army military forts - Fort Shaw. The theme is complementary to the Whiskey Trade and Reserve Period themes of non-native and native cultures. Together they have considerable potential for interpretive development and enhancement.

Ranching - One of the major focuses for the cattle industry in the late 1800's was the foothills and eastern slopes of the Northern Rockies. This area has the best rangeland in North America and was the last to be developed. There are many historic ranches along the Trail of the Great Bear. Large corporate ranches are represented by the Grant-Kohrs National Historic Site and ranches proposed for historic development in Southwestern Alberta. Accompanying these are many small ranches providing a contrast to the large enterprises. Some are suitable for appropriate interpretive development. The ranching theme is central to the non-native settlement history and ethos of the region. The theme is very much underdeveloped.

Ethnic Settlement - In the 1870's homesteaders began to filter in by wagon along routes such as the Boseman Trail, stern wheeler up the Missouri to Fort Benton, and on by wagon along the Whoop-up Trail. Mormons established early irrigation works in the Galliten Valley and the Cardston District, later erecting the first Mormon Temple in the British Commonwealth. Ethnic and religious settlement continued with the immigration of groups such as the Doukhabors. These early settlers, as well as later ethnic groups such as the Japanese, played a significant role in the development of the regions agriculture. The Japanese are commemorated by the Nikka Yuko Gardens in Lethbridge.

Settlement Towns and Cities - As ranching and settlement of the lands took hold in the late 1800's, communities grew and flourished. Distinctive streetscapes and buildings of the architectural styles of the period were constructed. A number remain today and are designated historic districts, areas and buildings. "Historic" communities such as High River, Fort Macleod, the municipality of Crowsnest Pass, Choteau and Livingstone and larger centres such as Calgary, Lethbridge, Helena, Butte, Bozeman and Missoula provide diverse opportunities for experiencing the urban architectural and related heritage of the Trail of the Great Bear.

Mining-Hard Rock - Montana was the focus of the last gold rushes and mineral development in the American West. Mines, camps, and communities proliferated during the heydays of gold and silver mining at the turn of the century and the mining and smelting of copper ores. The latter, as represented at Butte-Anaconda, continued until recent years and is of National Historic significance. A rich and significant visual architectural and historic legacy has been left along the Trail of the Great Bear for public interpretation and appreciation. The sites range from the large scale massive industrial developments such as that proposed for the Butte-Anaconda Historic Park, through small towns and mining centres, such as Phillipsburg, to the small scale mining camps like Garnet.

Mining-Coal - Significant coal mining districts developed in the Montana and Alberta Rockies to provide coke for the smelters and steam coal for the railroads. Historic districts/areas such as the Crowsnest Pass in Alberta, with developed and interpreted sites and programs, as well as historic districts with development potential such as Red Lodge Montana, provide the public an opportunity to appreciate the architectural and historic heritage associated with coal mining. Early development of the regions prairie coal resources is represented by the mines at Lethbridge, the first in Alberta.

Mining-Limestone - Lime was required for manufacturing mortar and cement. It is obtained by slacking-burning limestone in kilns. Few kiln sites dating to the turn of the century remain as most works have continued in operation since their establishment. Two sites, Old Town Kananaskis on the Bow and Grizzly Gulch at Helena, are identified. These sites are interesting architectural remains and can be interpreted.

Oil and Gas - The beginnings and first development of the Oil & Gas industry in Western Canada, lie along the Trail at Oil City in Waterton and Turner Valley. Contemporary developments include the Shell Waterton Complex. The Hells Half Acre interpretive development at Turner Valley will include significant architectural and industrial processes, providing a significant interpretive opportunity to travelers along the Trail.

Forest Products - The Trail of the Great Bear is peripheral to the major forestry areas of the Pacific Northwest. Major forestry developments occurred in the Flathead Valley. Most have lost their historic fabric. One company town with interesting architecture, Somers, is located on Flathead Lake.

Transportation - Stage and wagon roads were established in Montana and Alberta during the years preceding the railroads. Many of todays highways follow the earlier routes. Among those which remain are portions of the Mullen Road in Montana and various sections of the Fort Benton-MacLeod-Calgary Trail in Montana and Alberta. An important site relative to this theme is the Remington-Alberta Carriage Centre, currently under development in Cardston.

Transportation-Railroads - A number of railroads were constructed through the region utilizing the transcontinental passes and routes. Most are still operating. The High Level Bridge in Lethbridge is the highest and longest steel trestle bridge in the world. Some are abandoned as are facilities such as the Northern Pacific's Livingstone Depot whose history is related to the development of railway based tourism in Yellowstone National Park. Such sites are of architectural and historic interest.

National Park Values and Land Use History - Three of the major National Park complexes, Yellowstone, Banff and Waterton-Glacier, are within the Trail of the Great Bear. All three park areas have a significant history relating to uses of the lands before their establishment and subsequent park values and recreational history. Architecturally and historically significant administrative structures are associated. The human history aspect of the "Park Story" receives limited interpretation in park visitor centres or programming. It should be considerably enhanced.

Recreation-Hotels and Lodges - The national parks contain a number of grand hotels and smaller lodges of considerable architectural interest and historic significance. Many are designated historic sites. Some have come to symbolize, in many visitors minds, the parks with which they associate, Old Faithful Lodge, Many Glacier Hotel, Prince of Wales Hotel and the Banff Springs. The hotel histories extend back to the early years of the parks and the role of the railroads in initial tourism and infrastructure development. Most visitors are unaware of this facet of park history as there is little formal interpretation in the hotels.

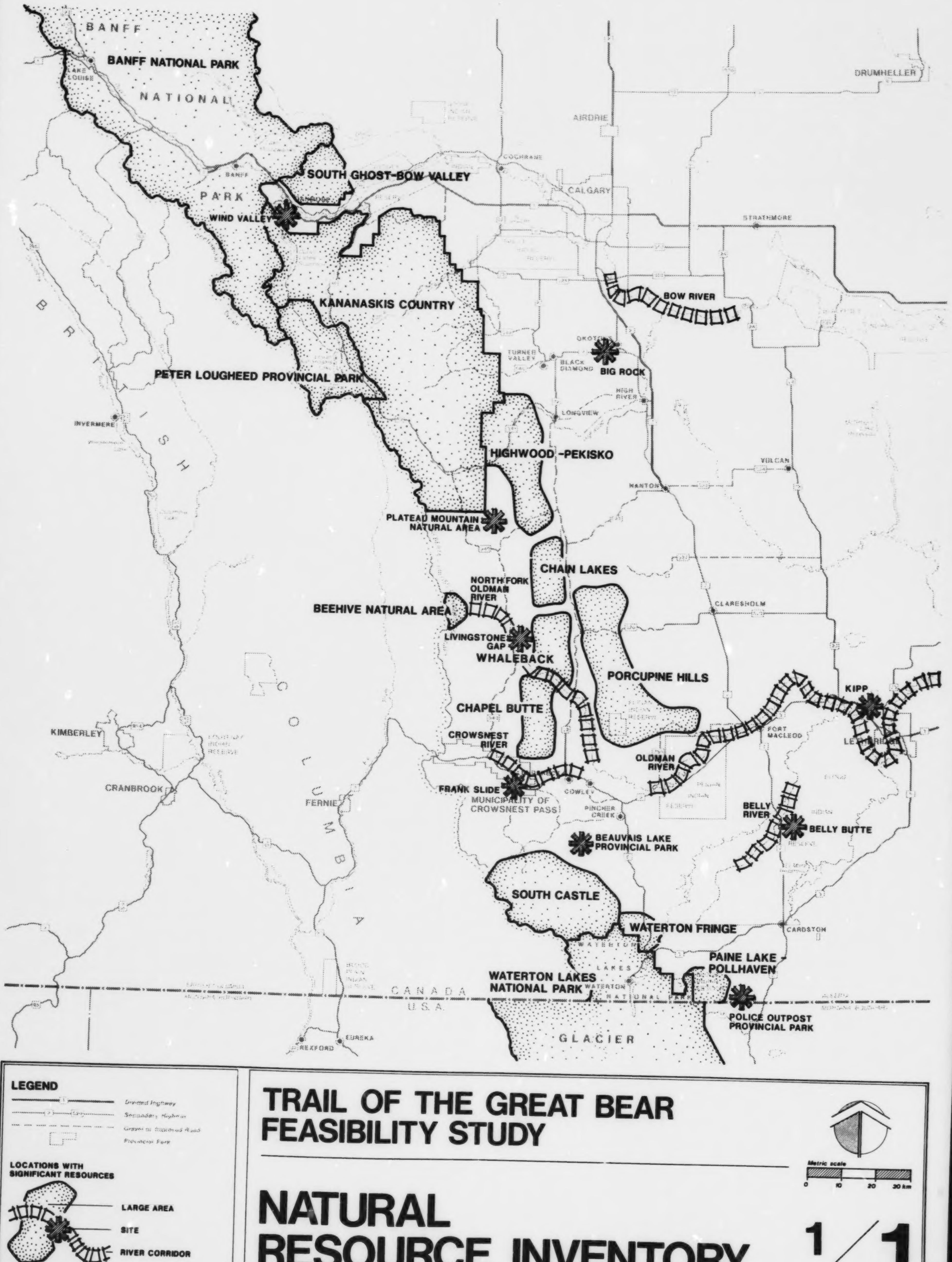
Human and Natural History Interpretation - A large number of museums and interpretive centres exist along the Trail and in its Gateway cities. These range from major national and regional centres, including the Glenbow, Buffalo Bill and Museum of the Rockies with a diverse range of exhibits and programming, to more focused smaller facilities such as the Waterton Heritage Centre and Livingstone Depot Centre. The smaller facilities provide the visitor the opportunity for more in depth experiences, most of which focus on human rather than natural history, utilizing standard museum display and presentation techniques. Many opportunities for enhancement exist.

Natural Disasters - Two sites lie within the Trail which were the location of nationally significant natural disasters, the Frank Slide in the Crowsnest Pass and the Madison Earthquake in Southwestern Montana. These historic events serve to illustrate to the visitor the underlying geological forces of the Rocky Mountains and the impact on human beings.

Others - There are many sites along the Trail which thematically do not relate to the principal Native and non-native settlement and resource use themes. Those of particular interest to the traveller have been included in the inventory. They include the Egg Mountain, the Montana State Prison, and the Kananaskis Prisoner of War Camp.

APPENDIX IV

NATURAL RESOURCES MAPS


BANFF NATIONAL PARK
BANFF NATIONAL PARK
LAKE LOUISE
BANFF
DRUMHELLER
AIRDRIE
COCHRANE
CALGARY
SOUTH GHOST-BOW VALLEY
WIND VALLEY
STRATHMORE
BOW RIVER
KANANASKIS COUNTRY
PETER LOUGHEED PROVINCIAL PARK
OKOTOKS
TURNER VALLEY
BLACK DIAMOND
BIG ROCK
HIGH RIVER
LONGVIEW
INVERMERE
HIGHWOOD -PEKISKO
VULCAN
NANTON
PLATEAU MOUNTAIN NATURAL AREA
CHAIN LAKES
NORTH FORK OLDMAN RIVER
BEEHIVE NATURAL AREA
CLARESHOLM
LIVINGSTONE GAP
WHALEBACK
PORCUPINE HILLS
KIPP
CHAPEL BUTTE
FORT MACLEOD
LETHBRIDGE
KIMBERLEY
CROWSNEST RIVER
OLDMAN RIVER
CRANBROOK
FRANK SLIDE
MUNICIPALITY OF CROWSNEST PASS
COWLEY
FERNIE
PINCHER CREEK
BELLY RIVER
BELLY BUTTE
BEAUVAIS LAKE PROVINCIAL PARK
SOUTH CASTLE
WATERTON FRINGE
CARDSTON
WATERTON LAKES NATIONAL PARK
PAINE LAKE - POLLHAVEN
CANADA
U.S.A.
POLICE OUTPOST PROVINCIAL PARK
REXFORD
EUREKA
GLACIER
BRITISH COLUMBIA

LEGEND

Divided highway
Secondary highway
Gravel or improved road
Provincial Park

LOCATIONS WITH SIGNIFICANT RESOURCES

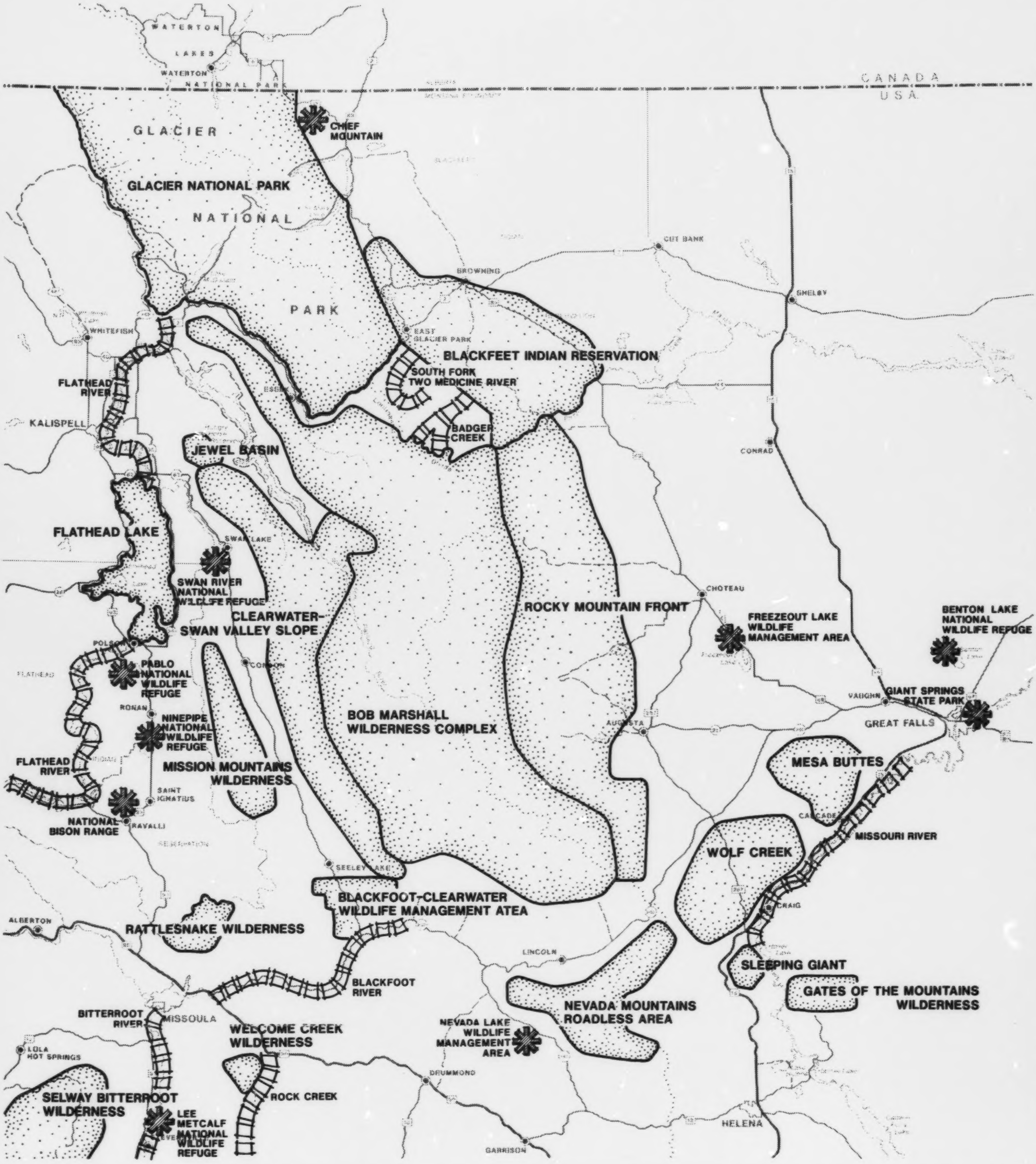
LARGE AREA
SITE
RIVER CORRIDOR

TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

NATURAL RESOURCE INVENTORY

Metric scale
0 10 20 30 km

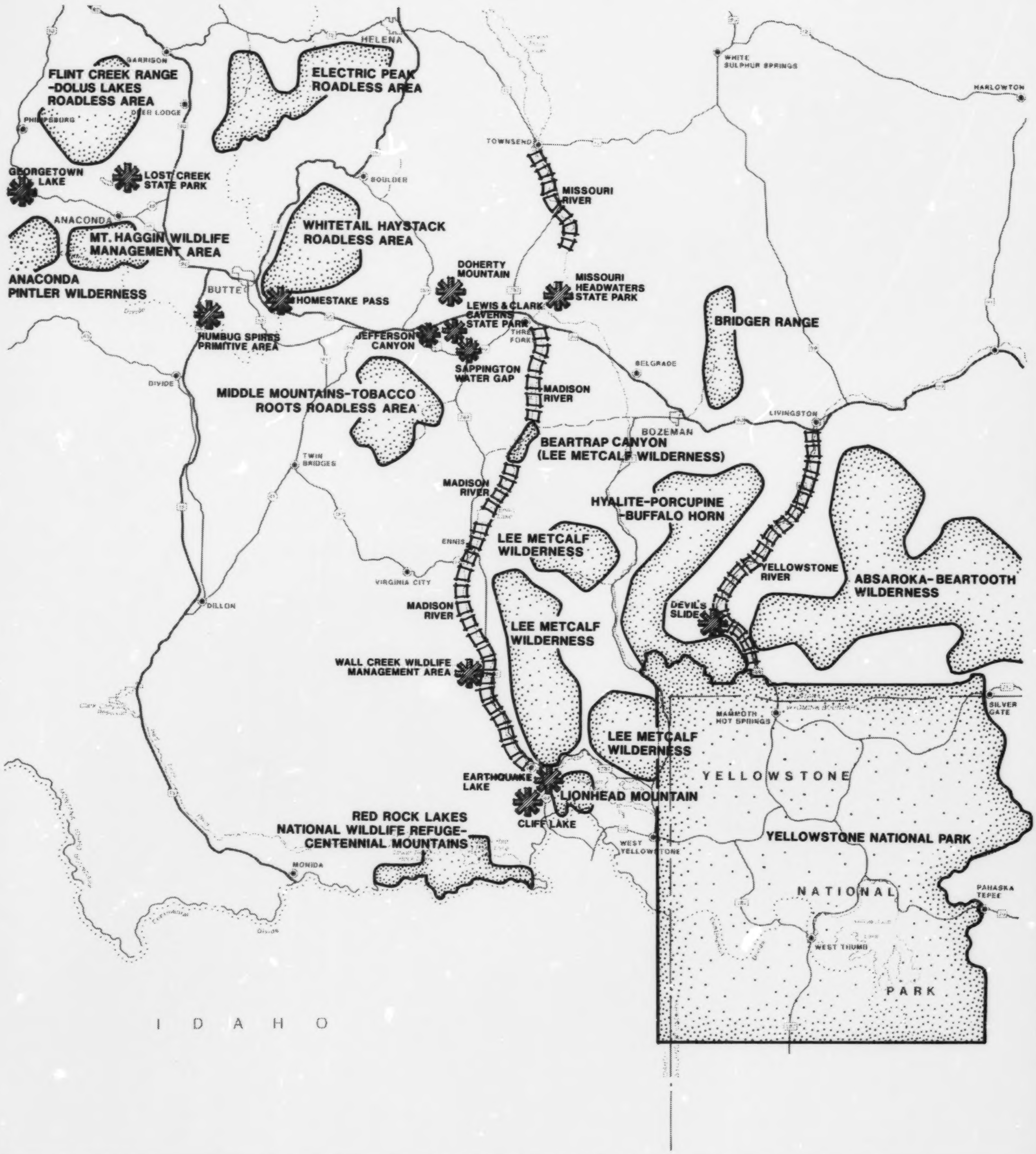
1/1


CANADA
USA
WATERTON LAKES
WATERTON
NATIONAL PARK
GLACIER NATIONAL PARK
CHIEF MOUNTAIN
CUT BANK
SHELBY
BROWNING
EAST GLACIER PARK
BLACKFEET INDIAN RESERVATION
SOUTH FORK TWO MEDICINE RIVER
BADGER CREEK
CONRAD
WHITEFISH
FLATHEAD RIVER
KALISPELL
JEWEL BASIN
FLATHEAD LAKE
SWAN LAKE
SWAN RIVER NATIONAL WILDLIFE REFUGE
CLEARWATER-SWAN VALLEY SLOPE
ROCKY MOUNTAIN FRONT
CHOTEAU
FREEZEOUT LAKE WILDLIFE MANAGEMENT AREA
BENTON LAKE NATIONAL WILDLIFE REFUGE
VAUGHN
GIANT SPRINGS STATE PARK
GREAT FALLS
POLSON
PABLO NATIONAL WILDLIFE REFUGE
RONAN
NINEPIPE NATIONAL WILDLIFE REFUGE
BOB MARSHALL WILDERNESS COMPLEX
AUGUSTA
MESA BUTTES
FLATHEAD RIVER
MISSION MOUNTAINS WILDERNESS
SAINT IGNATIUS
NATIONAL BISON RANGE
RAVALLI
CASCADE
MISSOURI RIVER
WOLF CREEK
SEELEY LAKE
BLACKFOOT-CLEARWATER WILDLIFE MANAGEMENT ATEA
CRAIG
ALBERTON
RATTLESNAKE WILDERNESS
LINCOLN
SLEEPING GIANT
BLACKFOOT RIVER
GATES OF THE MOUNTAINS WILDERNESS
NEVADA MOUNTAINS ROADLESS AREA
BITTERROOT RIVER
MISSOULA
WELCOME CREEK WILDERNESS
NEVADA LAKE WILDLIFE MANAGEMENT AREA
LOLO HOT SPRINGS
DRUMMOND
SELWAY BITTERROOT WILDERNESS
ROCK CREEK
LEE METCALF NATIONAL WILDLIFE REFUGE
HELENA
GARRISON
LEGEND
Interstate Highway
U.S. Highway
State Highway
Gravel or Improved Road
State Park
LOCATIONS WITH SIGNIFICANT RESOURCES
LARGE AREA
SITE
RIVER CORRIDOR
Metric scale
0 10 20 30 km

TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

NATURAL RESOURCE INVENTORY

2/1


FLINT CREEK RANGE
-DOLUS LAKES
ROADLESS AREA
GARRISON
PHILIPSBURG
DEER LODGE
GEORGETOWN
LAKE
LOST CREEK
STATE PARK
ANACONDA
MT. HAGGIN WILDLIFE
MANAGEMENT AREA
ANACONDA
PINTLER WILDERNESS
HELENA
ELECTRIC PEAK
ROADLESS AREA
BOULDER
WHITETAIL HAYSTACK
ROADLESS AREA
BUTTE
HOMESTAKE PASS
HUMBUG SPIRES
PRIMITIVE AREA
DIVIDE
Divide
TOWNSEND
MISSOURI
RIVER
DOHERTY
MOUNTAIN
MISSOURI
HEADWATERS
STATE PARK
LEWIS & CLARK
CAVERNS
STATE PARK
THREE
FORKS
JEFFERSON
CANYON
SAPPINGTON
WATER GAP
MIDDLE MOUNTAINS-TOBACCO
ROOTS ROADLESS AREA
MADISON
RIVER
BELGRADE
BOZEMAN
BEARTRAP CANYON
(LEE METCALF WILDERNESS)
TWIN
BRIDGES
MADISON
RIVER
ENNIS
LEE METCALF
WILDERNESS
VIRGINIA CITY
DILLON
MADISON
RIVER
LEE METCALF
WILDERNESS
WALL CREEK WILDLIFE
MANAGEMENT AREA
WHITE
SULPHUR SPRINGS
HARLOWTON
BRIDGER RANGE
LIVINGSTON
HYALITE-PORCUPINE
-BUFFALO HORN
YELLOWSTONE
RIVER
ABSAROKA-BEARTOOTH
WILDERNESS
DEVIL'S
SLIDE
MAMMOTH
HOT SPRINGS
SILVER
GATE
LEE METCALF
WILDERNESS
YELLOWSTONE
EARTHQUAKE
LAKE
LIONHEAD MOUNTAIN
CLIFF LAKE
RED ROCK LAKES
NATIONAL WILDLIFE REFUGE-
CENTENNIAL MOUNTAINS
WEST
YELLOWSTONE
YELLOWSTONE NATIONAL PARK
NATIONAL
PAHASKA
TEPEE
WEST THUMB
PARK
MONIDA
IDAHO

LEGEND

- Interstate Highway
- U.S. Highway
- State Highway
- Gravel or Improved Road
- State Park

LOCATIONS WITH SIGNIFICANT RESOURCES

- LARGE AREA
- SITE
- RIVER CORRIDOR

TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

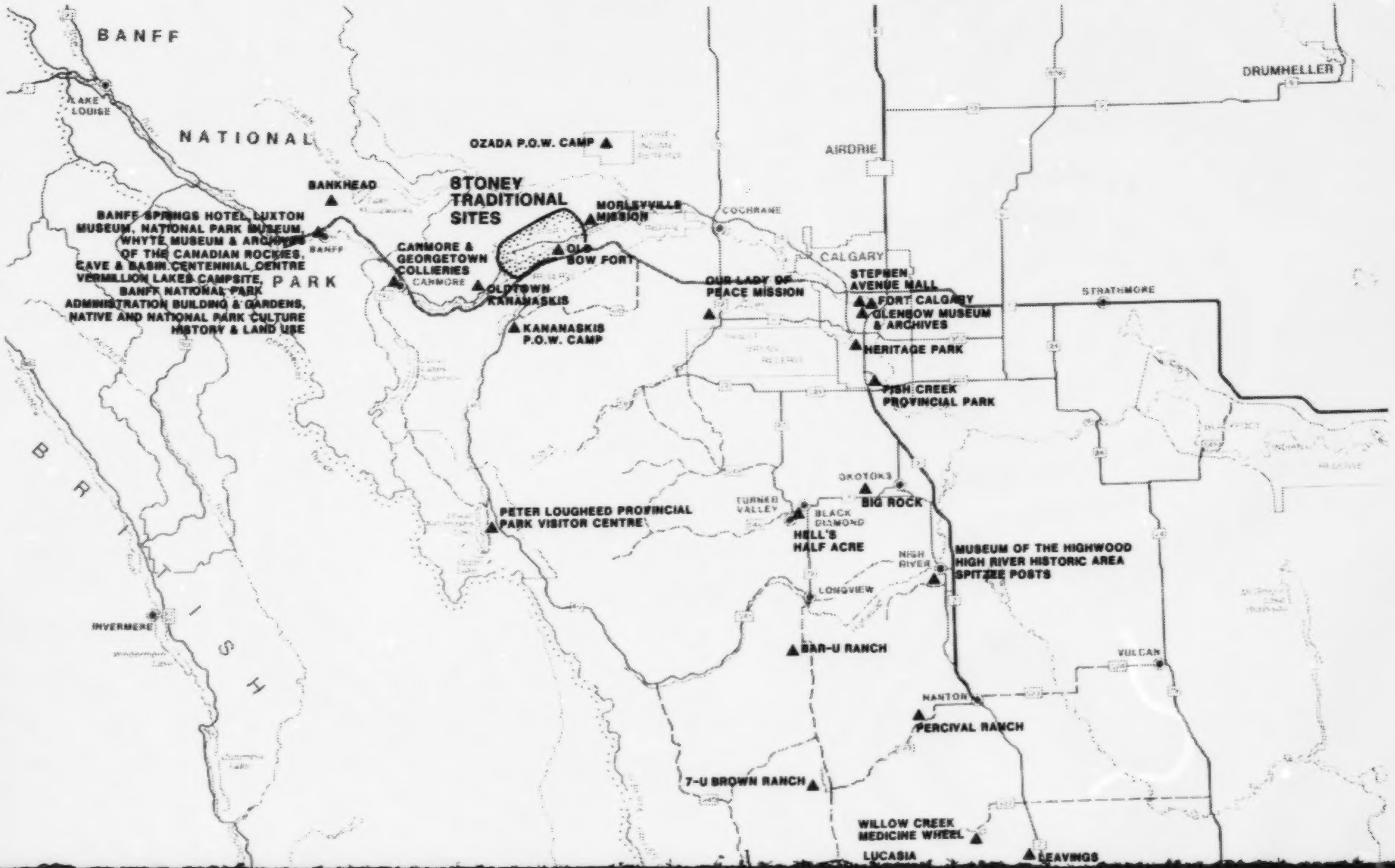
Metric scale
0 10 20 30 km

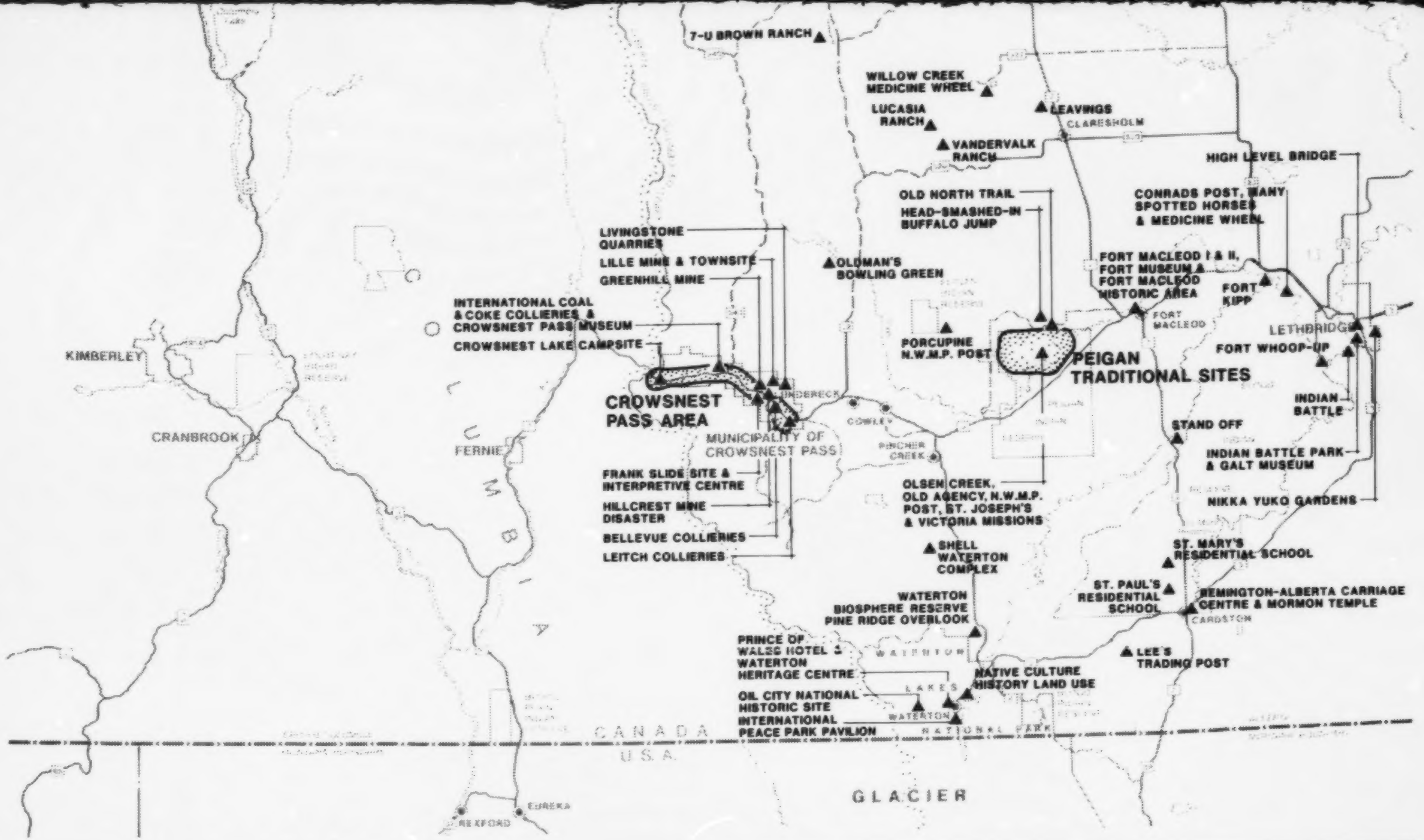
NATURAL RESOURCE INVENTORY

3/1

APPENDIX V

CULTURAL/HISTORIC RESOURCES MAPS


BANFF
NATIONAL
PARK
BRITISH
LAKE LOUISE
BANFF
BANKHEAD
BANFF SPRINGS HOTEL, LUXTON MUSEUM, NATIONAL PARK MUSEUM, WHYTE MUSEUM & ARCHIVES OF THE CANADIAN ROCKIES, CAVE & BASIN CENTENNIAL CENTRE VERMILLION LAKES CAMPSITE, BANFF NATIONAL PARK ADMINISTRATION BUILDING & GARDENS, NATIVE AND NATIONAL PARK CULTURE HISTORY & LAND USE
CANMORE & GEORGETOWN COLLIERIES
CANMORE
OZADA P.O.W. CAMP
STONEY TRADITIONAL SITES
MORLEYVILLE MISSION
OLD BOW FORT
OLDTOWN KANANASKIS
KANANASKIS P.O.W. CAMP
COCHRANE
OUR LADY OF PEACE MISSION
AIRDRIE
CALGARY
STEPHEN AVENUE MALL
FORT CALGARY
GLENBOW MUSEUM & ARCHIVES
HERITAGE PARK
FISH CREEK PROVINCIAL PARK
STRATHMORE
DRUMHELLER
PETER LOUGHEED PROVINCIAL PARK VISITOR CENTRE
TURNER VALLEY
BLACK DIAMOND
HELL'S HALF ACRE
OKOTOKS
BIG ROCK
HIGH RIVER
MUSEUM OF THE HIGHWOOD HIGH RIVER HISTORIC AREA SPITZEE POSTS
LONGVIEW
BAR-U RANCH
INVERMERE
VULCAN
NANTON
PERCIVAL RANCH
7-U BROWN RANCH
WILLOW CREEK MEDICINE WHEEL
LUCASIA
LEAVINGS


7-U BROWN RANCH
WILLOW CREEK MEDICINE WHEEL
LEAVINGS
CLARESHOLM
LUCASIA RANCH
VANDERVALK RANCH
HIGH LEVEL BRIDGE
CONRADS POST, MANY SPOTTED HORSES & MEDICINE WHEEL
OLD NORTH TRAIL
HEAD-SMASHED-IN BUFFALO JUMP
LIVINGSTONE QUARRIES
LILLE MINE & TOWNSITE
GREENHILL MINE
OLDMAN'S BOWLING GREEN
FORT MACLEOD I & II, FORT MUSEUM & FORT MACLEOD HISTORIC AREA
FORT KIPP
FORT MACLEOD
LETHBRIDGE
FORT WHOOP-UP
INTERNATIONAL COAL & COKE COLLIERIES & CROWSNEST PASS MUSEUM
CROWSNEST LAKE CAMPSITE
KIMBERLEY
PORCUPINE N.W.M.P. POST
PEIGAN TRADITIONAL SITES
CROWSNEST PASS AREA
COLUMBIA
CRANBROOK
FERNIE
MUNICIPALITY OF CROWSNEST PASS
COWLEY
PINCHER CREEK
INDIAN BATTLE
STAND OFF
INDIAN BATTLE PARK & GALT MUSEUM
FRANK SLIDE SITE & INTERPRETIVE CENTRE
HILLCREST MINE DISASTER
BELLEVUE COLLIERIES
LEITCH COLLIERIES
OLSEN CREEK, OLD AGENCY, N.W.M.P. POST, ST. JOSEPH'S & VICTORIA MISSIONS
NIKKA YUKO GARDENS
SHELL WATERTON COMPLEX
ST. MARY'S RESIDENTIAL SCHOOL
ST. PAUL'S RESIDENTIAL SCHOOL
REMINGTON-ALBERTA CARRIAGE CENTRE & MORMON TEMPLE
CARDSTON
WATERTON BIOSPHERE RESERVE PINE RIDGE OVERLOOK
PRINCE OF WALES HOTEL & WATERTON HERITAGE CENTRE
LEE'S TRADING POST
WATERTON LAKES
NATIVE CULTURE HISTORY LAND USE
OIL CITY NATIONAL HISTORIC SITE
INTERNATIONAL PEACE PARK PAVILION
WATERTON NATIONAL PARK
CANADA
U.S.A.
GLACIER
EUREKA
REXFORD

LEGEND

Divided Highway
Secondary Highway
Gravel or Improved Road
Provincial Park

LOCATION WITH CULTURAL & HISTORIC RESOURCES

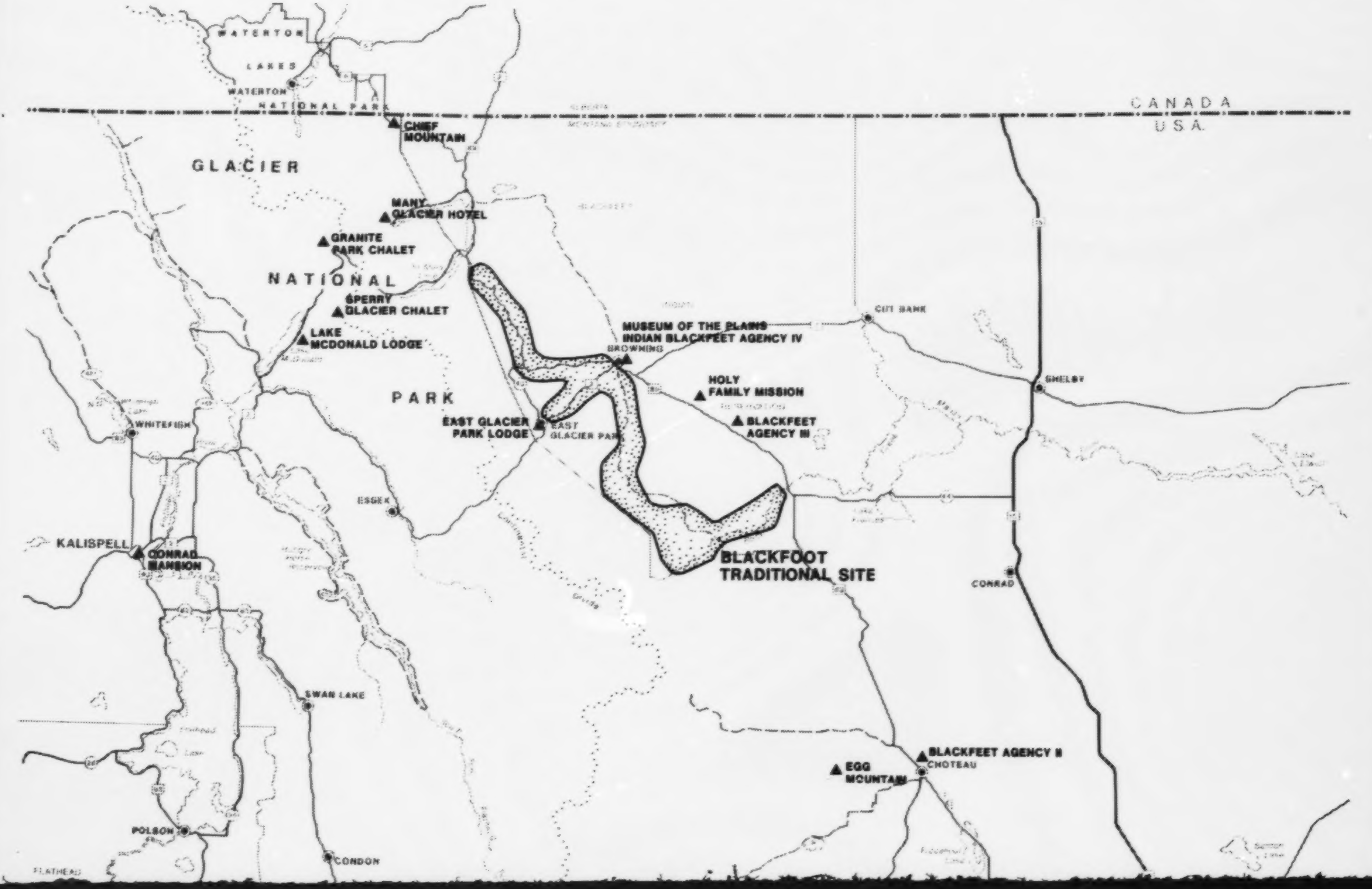
SITE
LARGE AREA

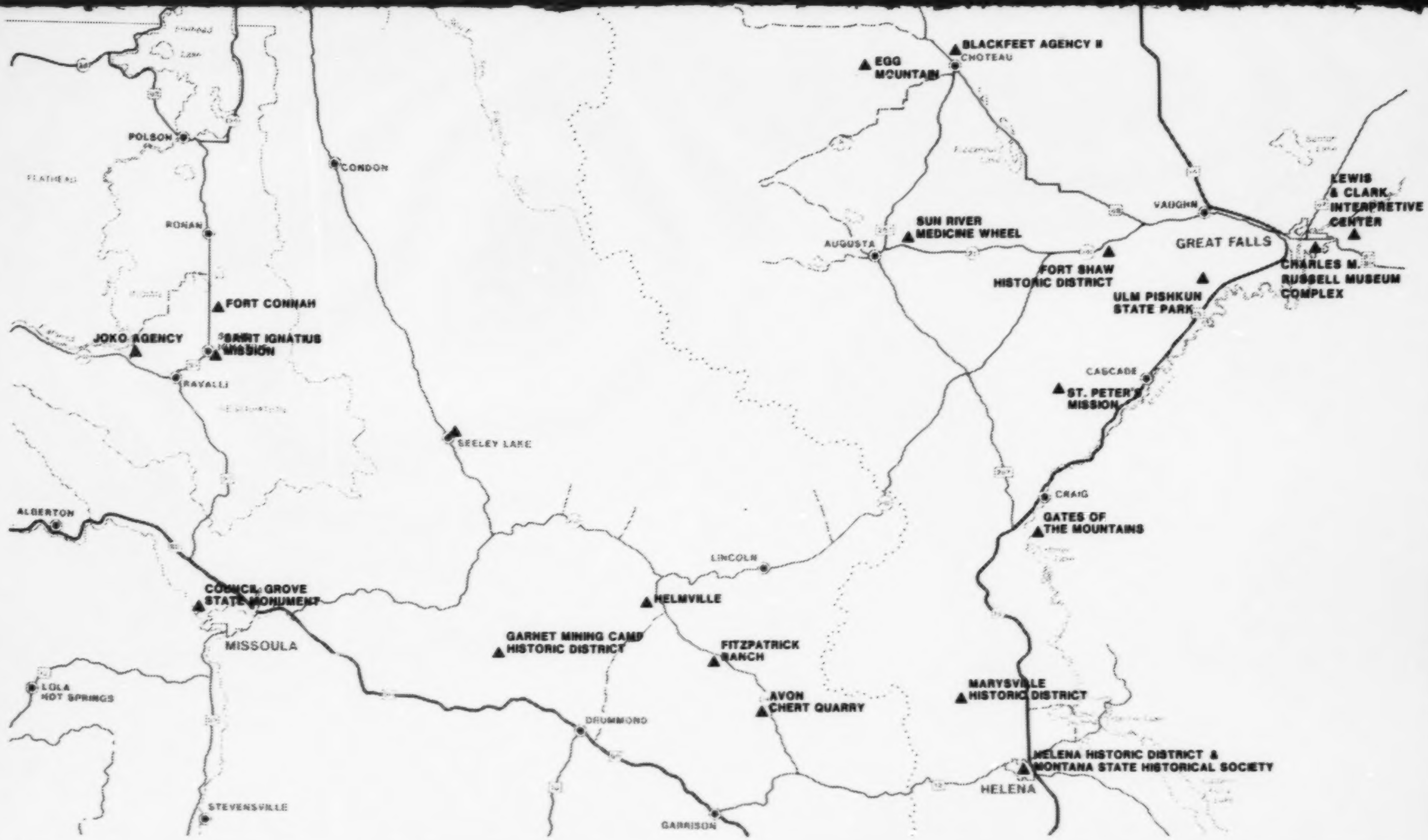
TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

CULTURAL & HISTORIC RESOURCE INVENTORY

Metric scale
0 10 20 30 km

1/2


WATERTON
LAKES
WATERTON
NATIONAL PARK
CANADA
U.S.A.
CHIEF MOUNTAIN
GLACIER
NATIONAL
PARK
MANY GLACIER HOTEL
GRANITE PARK CHALET
SPERRY GLACIER CHALET
LAKE MCDONALD LODGE
MUSEUM OF THE PLAINS INDIAN BLACKFEET AGENCY IV
BROWNING
HOLY FAMILY MISSION
BLACKFEET AGENCY III
CUT BANK
SHELBY
EAST GLACIER PARK LODGE
EAST GLACIER PARK
ESSEX
WHITEFISH
KALISPELL
CONRAD MANSION
BLACKFOOT TRADITIONAL SITE
CONRAD
SWAN LAKE
POLSON
CONDON
FLATHEAD
EGG MOUNTAIN
BLACKFEET AGENCY II
CHOTEAU


BLACKFEET AGENCY II
CHOTEAU
EGG MOUNTAIN
POLSON
FLATHEAD
CONDON
RONAN
SUN RIVER MEDICINE WHEEL
AUGUSTA
VAUGHN
GREAT FALLS
LEWIS & CLARK INTERPRETIVE CENTER
CHARLES M. RUSSELL MUSEUM COMPLEX
FORT SHAW HISTORIC DISTRICT
ULM PISHKUN STATE PARK
FORT CONNAH
JOKO AGENCY
SAINT IGNATIUS MISSION
RAVALLI
CASCADE
ST. PETER'S MISSION
SEELEY LAKE
CRAIG
GATES OF THE MOUNTAINS
ALBERTON
LINCOLN
COUNCIL GROVE STATE MONUMENT
HELMVILLE
MISSOULA
GARNET MINING CAMP HISTORIC DISTRICT
FITZPATRICK RANCH
LOLA HOT SPRINGS
AVON CHERT QUARRY
MARYSVILLE HISTORIC DISTRICT
DRUMMOND
HELENA HISTORIC DISTRICT & MONTANA STATE HISTORICAL SOCIETY
HELENA
STEVENSVILLE
GARRISON
Metric scale
0
10
20
30 km

LEGEND

Interstate Highway
U.S. Highway
State Highway
Gravel or Improved Road
State Park

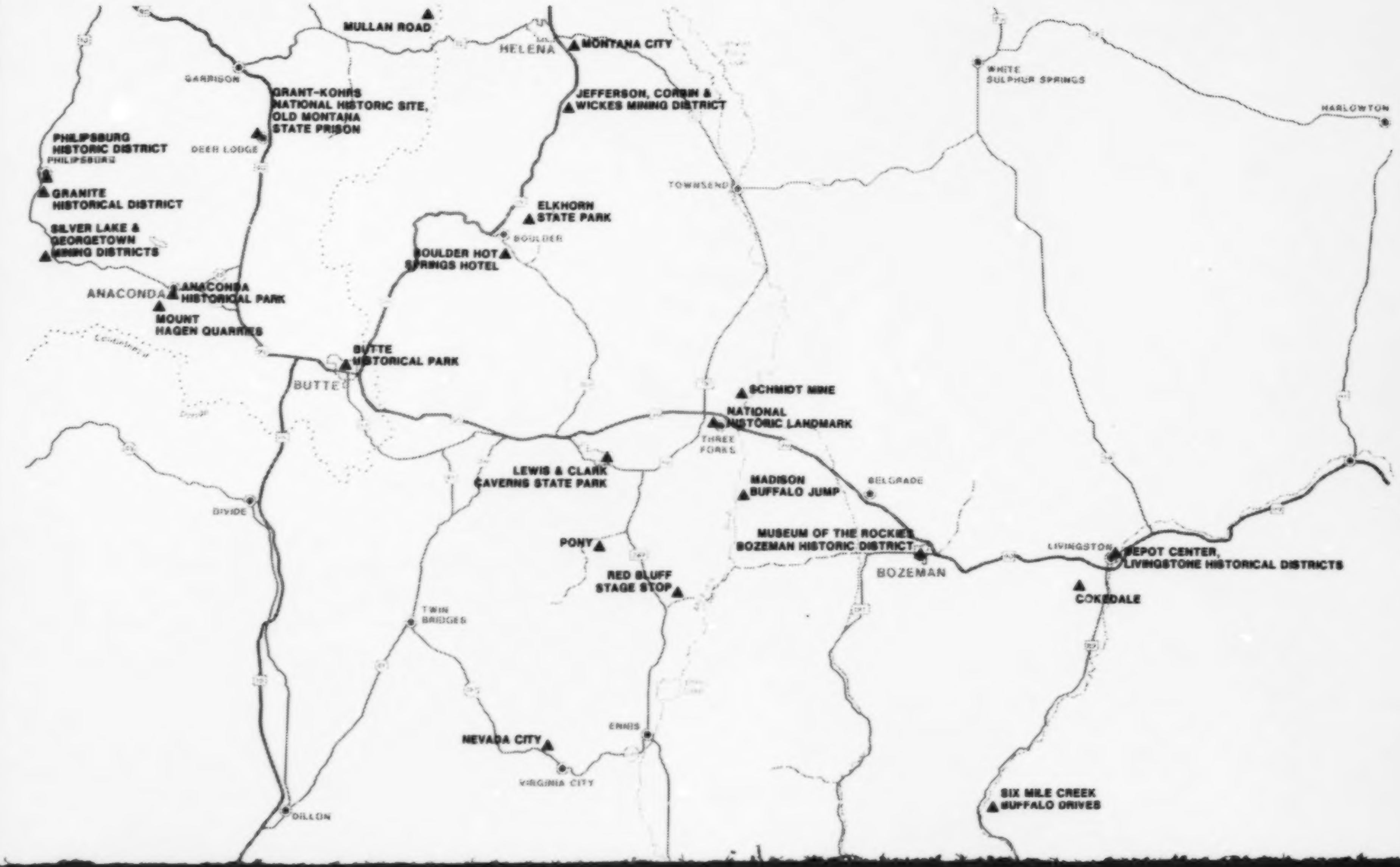
LOCATION WITH CULTURAL & HISTORIC RESOURCES

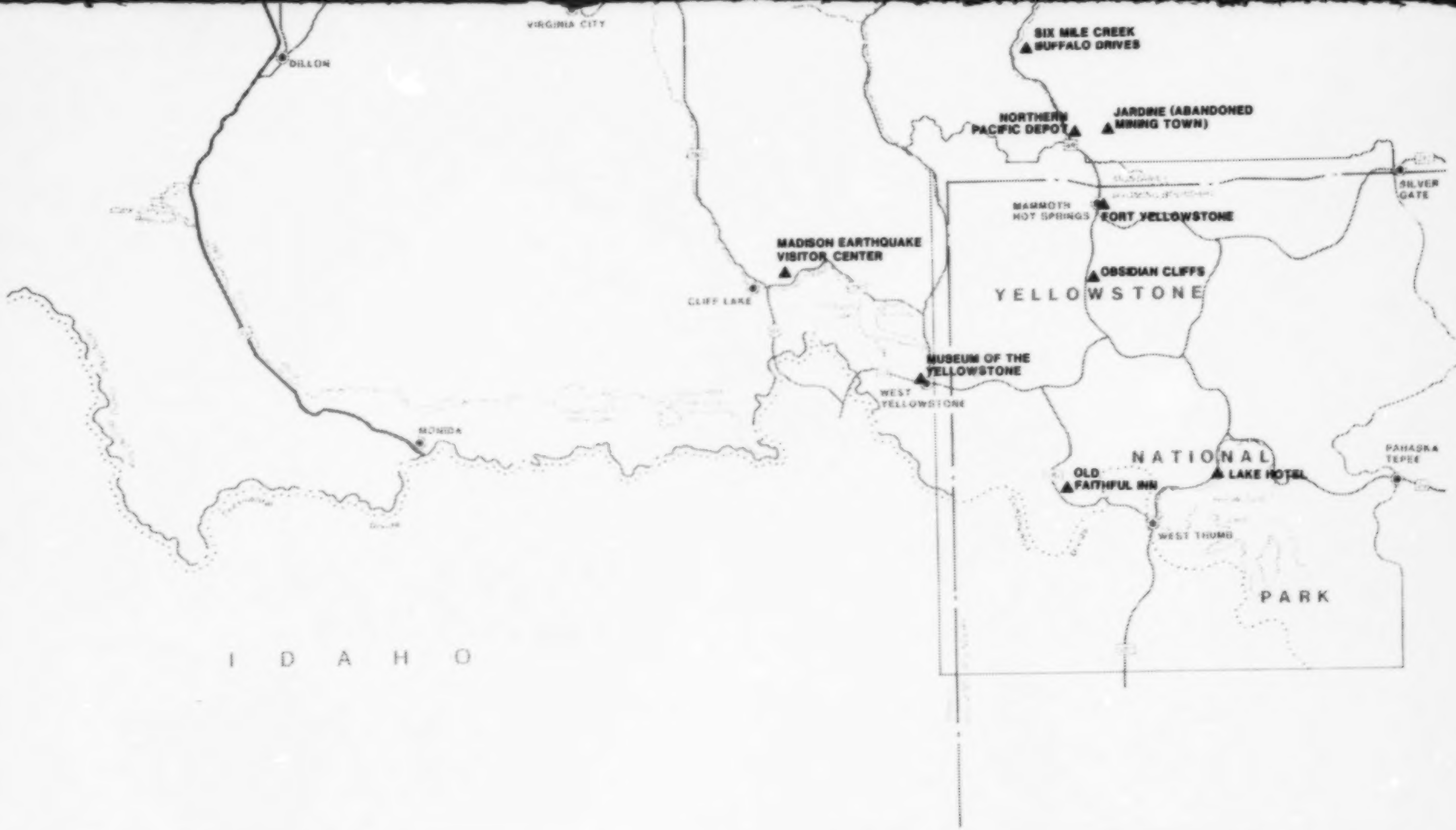
SITE
LARGE AREA

TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

CULTURAL & HISTORIC RESOURCE INVENTORY

2/2


MULLAN ROAD
HELENA
MONTANA CITY
GARRISON
GRANT-KOHRS NATIONAL HISTORIC SITE, OLD MONTANA STATE PRISON
JEFFERSON, CORBIN & WICKES MINING DISTRICT
WHITE SULPHUR SPRINGS
HARLOWTON
PHILIPSBURG HISTORIC DISTRICT
PHILIPSBURG
DEER LODGE
TOWNSEND
GRANITE HISTORICAL DISTRICT
ELKHORN STATE PARK
BOULDER
SILVER LAKE & GEORGETOWN MINING DISTRICTS
BOULDER HOT SPRINGS HOTEL
ANACONDA
ANACONDA HISTORICAL PARK
MOUNT HAGEN QUARRIES
BUTTE HISTORICAL PARK
BUTTE
SCHMIDT MINE
NATIONAL HISTORIC LANDMARK
THREE FORKS
LEWIS & CLARK CAVERNS STATE PARK
DIVIDE
MADISON BUFFALO JUMP
BELGRADE
MUSEUM OF THE ROCKIES
BOZEMAN HISTORIC DISTRICT
BOZEMAN
PONY
LIVINGSTON
DEPOT CENTER, LIVINGSTONE HISTORICAL DISTRICTS
RED BLUFF STAGE STOP
COKEDALE
TWIN BRIDGES
ENNIS
NEVADA CITY
VIRGINIA CITY
SIX MILE CREEK BUFFALO DRIVES
DILLON


VIRGINIA CITY
DILLON
SIX MILE CREEK BUFFALO DRIVES
NORTHERN PACIFIC DEPOT
JARDINE (ABANDONED MINING TOWN)
SILVER GATE
MAMMOTH HOT SPRINGS
FORT YELLOWSTONE
MADISON EARTHQUAKE VISITOR CENTER
CLIFF LAKE
OBSIDIAN CLIFFS
YELLOWSTONE
MUSEUM OF THE YELLOWSTONE
WEST YELLOWSTONE
MONIDA
NATIONAL
OLD FAITHFUL INN
LAKE HOTEL
PAHASKA TEPEE
WEST THUMB
PARK
IDAHO

LEGEND

Interstate Highway
U.S. Highway
State Highway
Gravel or Improved Road
State Park

LOCATION WITH CULTURAL & HISTORIC RESOURCES

SITE
LARGE AREA

TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

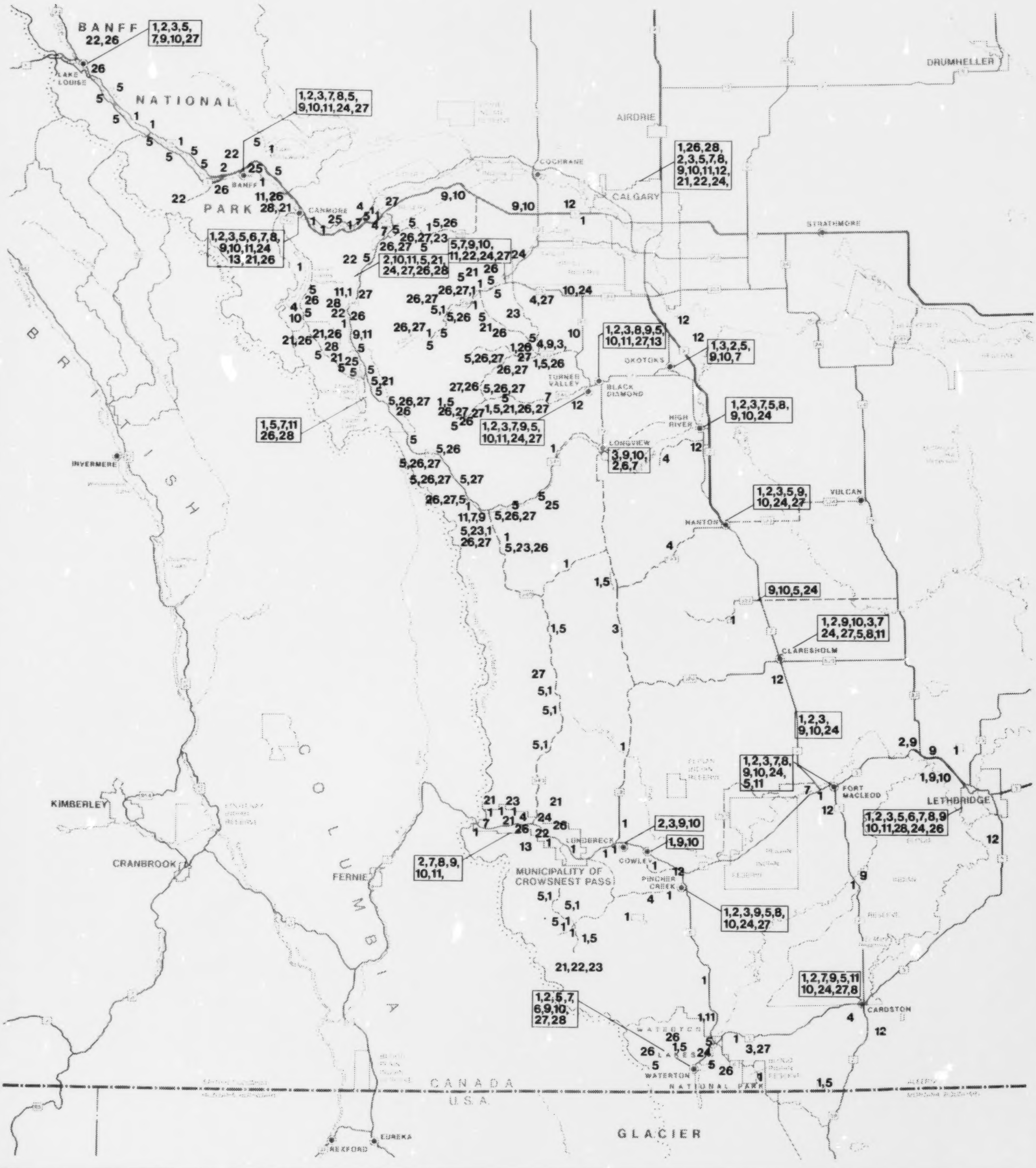
Metric scale
0 10 20 30 km

CULTURAL & HISTORIC RESOURCE INVENTORY

3/2

APPENDIX VI

TOURISM RESOURCES MAPS


BANFF
NATIONAL
PARK
LAKE LOUISE
BANFF
CANMORE
COCHRANE
AIRDRIE
CALGARY
STRATHMORE
DRUMHELLER
OKOTOKS
TURNER VALLEY
BLACK DIAMOND
HIGH RIVER
LONGVIEW
NANTON
VULCAN
CLARESHOLM
FORT MACLEOD
LETHBRIDGE
LUNDBRECK
COWLEY
PINCHER CREEK
MUNICIPALITY OF CROWSNEST PASS
CARDSTON
WATERTON LAKES NATIONAL PARK
WATERTON
GLACIER
CANADA
U.S.A.
BRITISH COLUMBIA
INVERMERE
KIMBERLEY
CRANBROOK
FERNIE
EUREKA
REXFORD
1,2,3,5, 7,9,10,27
22,26
1,2,3,7,8,5, 9,10,11,24,27
1,2,3,5,6,7,8, 9,10,11,24 13,21,26
11,26 28,21
5,7,9,10, 11,22,24,27
2,10,11,5,21, 24,27,26,28
1,5,7,11 26,28
1,2,3,7,9,5, 10,11,24,27
1,26,28, 2,3,5,7,8, 9,10,11,12, 21,22,24,
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1,3,2,5, 9,10,7
1,2,3,7,5,8, 9,10,24
3,9,10, 2,6,7
1,2,3,5,9, 10,24,27
9,10,5,24
1,2,9,10,3,7 24,27,5,8,11
1,2,3, 9,10,24
1,2,3,7,8, 9,10,24, 5,11
1,2,3,5,6,7,8,9 10,11,28,24,26
2,3,9,10
1,9,10
1,2,3,9,5,8, 10,24,27
2,7,8,9, 10,11,
1,2,5,7, 6,9,10, 27,28
1,2,7,9,5,11 10,24,27,8

LEGEND

Divided Highway
Secondary Highway
Gravel or Improved Road
Provincial Park

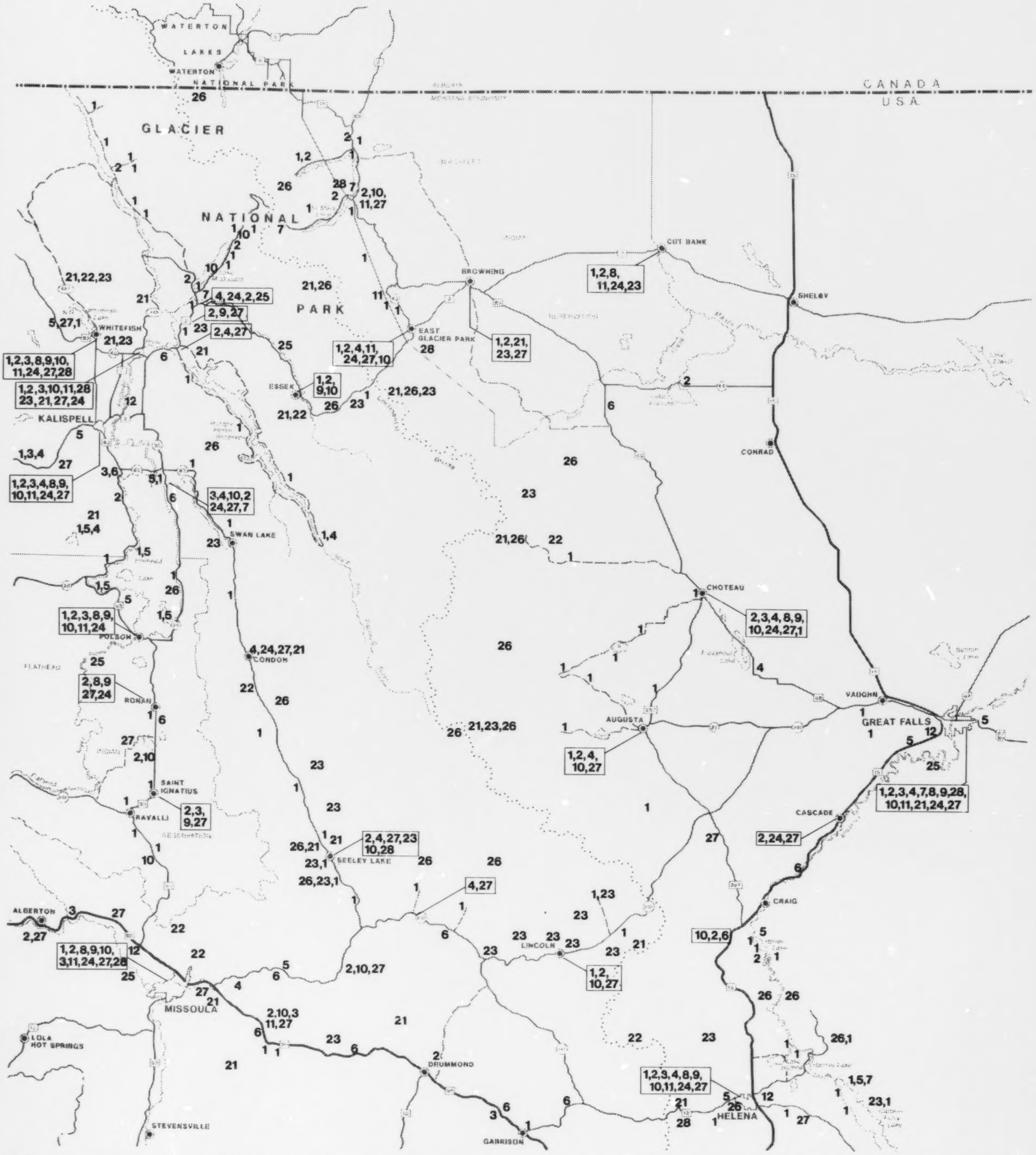
1 CAMPGROUND
2 HOTEL/MOTEL
3 BED/BREAKFAST
4 GUEST RANCH
5 PICNIC/DAY USE AREA
6 REST AREA
7 INFORMATION
8 HOSPITAL
9 GAS STATION
10 RESTAURANT
11 FAST FOOD
12 AIRPORT/AIRSTRIP
13 HELIPORT
21 CROSS COUNTRY SKIING
22 DOWNHILL SKIING
23 SNOWMOBILING
24 GOLF COURSE
25 WHITEWATER RAFTING
26 HIKING
27 OUTFITTER, EQUESTRIAN
28 CYCLING

TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

Metric scale
0 10 20 30 km

TOURISM RESOURCE INVENTORY

1/3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GLACIER
NATIONAL
PARK
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SHELBY
BROWNING
1,2,21,
23,27
EAST GLACIER PARK
28
1,2,4,11,
24,27,10
2,10,
11,27
4,24,2,25
2,9,27
2,4,27
WHITEFISH
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21,22,23
5,27,1
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11,24,27,28
1,2,3,10,11,28
23,21,27,24
KALISPELL
1,3,4
1,2,3,4,8,9,
10,11,24,27
ESSEX
1,2,
9,10
21,22
21,26,23
CONRAD
SWAN LAKE
3,4,10,2
24,27,7
1,4
POLSON
1,2,3,8,9,
10,11,24
FLATHEAD
CONDON
4,24,27,21
RONAN
2,8,9
27,24
SAINT IGNATIUS
2,3,
9,27
RAVALLI
CHOTEAU
2,3,4,8,9,
10,24,27,1
AUGUSTA
1,2,4,
10,27
21,23,26
VAUGHN
GREAT FALLS
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10,11,21,24,27
CASCADE
2,24,27
SEELEY LAKE
2,4,27,23
10,28
4,27
ALBERTON
2,27
1,2,8,9,10,
3,11,24,27,28
MISSOULA
2,10,27
2,10,3
11,27
LOLA HOT SPRINGS
STEVENSVILLE
LINCOLN
1,2,
10,27
CRAIG
10,2,6
DRUMMOND
GARRISON
HELENA
1,2,3,4,8,9,
10,11,24,27
26,1
1,5,7
23,1

LEGEND

Interstate Highway

U.S. Highway

State Highway

Gravel or improved Road

State Park

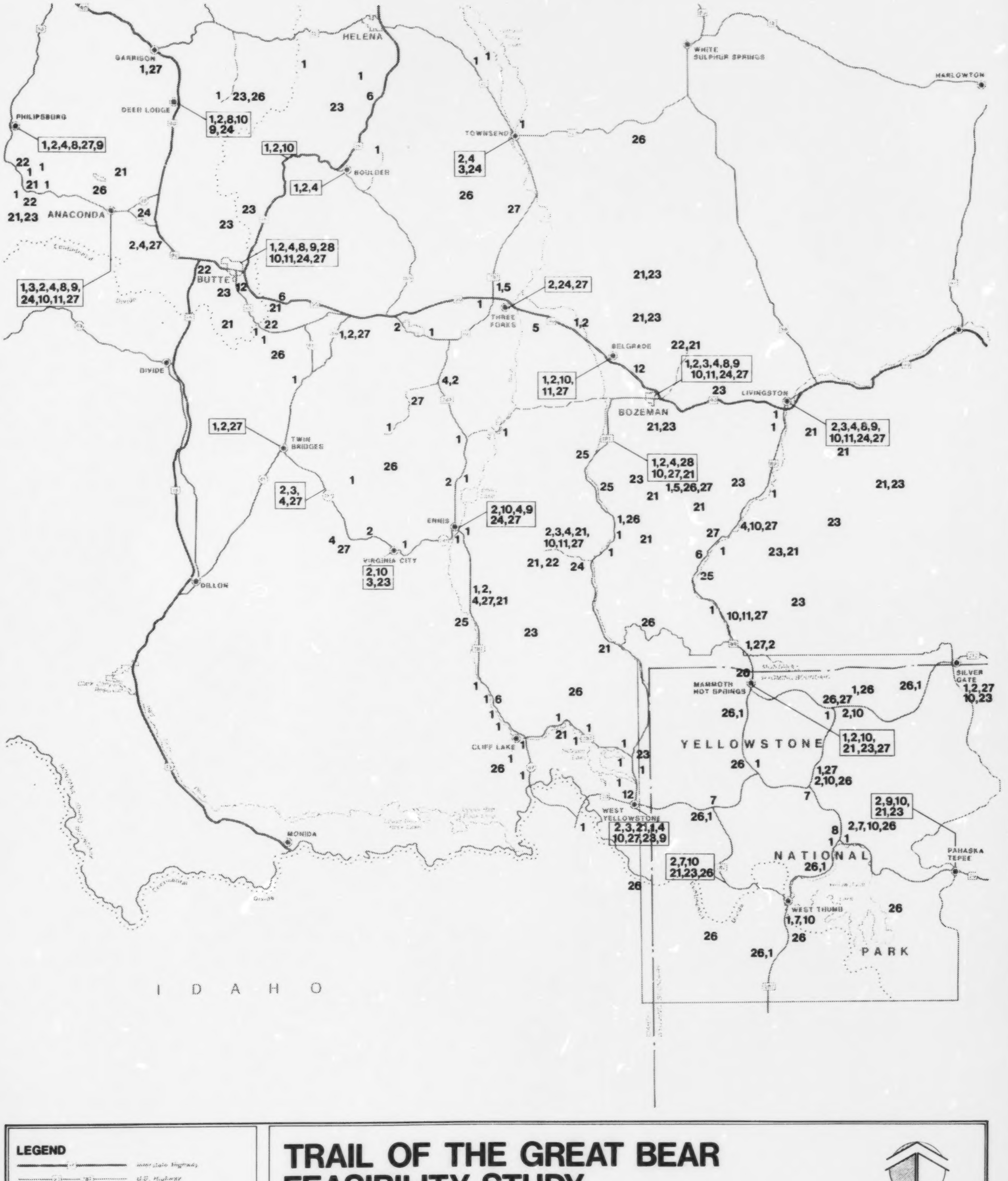
1	CAMPGROUND
2	HOTEL/MOTEL
3	BED/BREAKFAST
4	GUEST RANCH
5	PICNIC/DAY USE AREA
6	REST AREA
7	INFORMATION
8	HOSPITAL
9	GAS STATION
10	RESTAURANT
11	FAST FOOD
12	AIRPORT/AIRSTRIP
13	HELIPORT
21	CROSS COUNTRY SKIING
22	DOWNHILL SKIING
23	SNOWMOBILING
24	GOLF COURSE
25	WHITEWATER RAFTING
26	HIKING
27	OUTFITTER, EQUESTRIAN
28	CYCLING

TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

Metric scale 0 10 20 30 km

TOURISM RESOURCE INVENTORY

2/3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1,3,2,4,8,9,
24,10,11,27
BUTTE
1,2,4,8,9,28
10,11,24,27
BOULDER
1,2,4
1,2,10
TOWNSEND
2,4
3,24
WHITE SULPHUR SPRINGS
HARLOWTON
THREE FORKS
2,24,27
BELGRADE
1,2,10,
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BOZEMAN
1,2,3,4,8,9
10,11,24,27
LIVINGSTON
2,3,4,6,9,
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1,2,4,28
10,27,21
DIVIDE
TWIN BRIDGES
1,2,27
2,3,
4,27
ENNIS
2,10,4,9
24,27
VIRGINIA CITY
2,10
3,23
DILLON
CLIFF LAKE
MONIDA
WEST YELLOWSTONE
2,3,21,1,4
10,27,28,9
2,7,10
21,23,26
MAMMOTH HOT SPRINGS
1,2,10,
21,23,27
SILVER GATE
1,2,27
10,23
YELLOWSTONE NATIONAL PARK
2,9,10,
21,23
PAHASKA TEPEE
WEST THUMB
1,7,10
IDAHO

TRAIL OF THE GREAT BEAR FEASIBILITY STUDY

TOURISM RESOURCE INVENTORY

3/3

Metric scale 0 10 20 30 km

LEGEND

Interstate Highway
U.S. Highway
State Highway
Gravel or Improved Road
State Park

1 CAMPGROUND
2 HOTEL/MOTEL
3 BED/BREAKFAST
4 GUEST RANCH
5 PICNIC/DAY USE AREA
6 REST AREA
7 INFORMATION
8 HOSPITAL
9 GAS STATION
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27 OUTFITTER, EQUESTRIAN
28 CYCLING

APPENDIX VII

OTHER ROUTE SEGMENTS

TRAIL OF THE GREAT BEAR

APPENDIX VII

OTHER ROUTE SEGMENTS

Introduction

For reasons of efficiency in the inventory and assessment phase of the study, a number of route segments were not included in detailed review, due to limited natural or cultural/historic resources and/or because adjacent segments were overwhelmingly rich in resources. A brief description of these segments is presented below:

Description of Segments

Highway 2: Calgary to Claresholm

General Description: This route travels through a very flat and intensely farmed landscape. There are small natural pockets of riparian vegetation on the crossings of the Sheep and Highwood Rivers. Closer to Claresholm, there are some views to the prominent Porcupine Hills to the west.

Highway 1: Calgary to Highway 22

General Description: This route passes through a strongly rolling but extensively farmed area. There are good views to the distant Rocky Mountains in the west.

Highway 2: Fort Macleod to Cardston

General Description: Highway 2 travels through gently rolling but intensely farmed land south of Fort Macleod. There are pockets of natural grassland on the Blood Indian Reserve south of Standoff and extensive and diverse riparian habitat along the Belly River. The Belly Buttes are a small but striking area of pinkish eroded badlands which lie on the east side of the Belly River on the Blood Indian Reserve.

Highway 2: Browning to Cutbank

General Description: U.S. Highway 2 travels through gently rolling countryside with a mixture of cropland and natural grassland. There are no major biophysical attractions or significant scenic sections.

Secondary Route 279: Montana Highway 200 to Helena

General Description: From Montana 200, Secondary Route 279 climbs through dense Douglas fir and Ponderosa pine forest on subdued mountains then drops into a small area of sagebrush and grassland before entering the heavily developed portion of the Helena valley.

Montana Highway 200: U.S. Highway 89 west to Montana Highway 141

General Description: This low elevation route travels through extensive cropland, rolling grassland and eventually into dense lodgepole pine, Ponderosa pine and Douglas fir forest. There are some stretches of diverse riparian habitat and occasionally impressive views to the Rocky Mountain Front but these are better represented on adjacent or alternative routes. There are a number of very visible clear-cuts in the vicinity of Lincoln.

Secondary Route 434: Montana Highway 200 to Wolf Creek

General Description: This route travels through grassland and Ponderosa pine and limber pine ridges but is mostly confined to the bottom of a fairly narrow valley. Consequently, the scenery is not as impressive as that on the nearby Highway 287. The southern end is a more diverse tree-lined road with rock knobs, riparian woodland and open Ponderosa pine. Evidence of human impact is minimal and includes minor areas of cropland and forest clear-cuts.

Highway I-90: Missoula to Drummond

General Description: This route travels along the valley bottom of the Clark Fork River past subdued mountains with dense to open montane coniferous forests. There is some riparian shrubbery along the river and in the eastern portion there are grassy hillsides, aspen woodlands and some rimrock and impressive castellated rocky crags. There is moderate evidence of human activity along most portions of the route.

Highway I-90: Anaconda to Garrison

General Description: This route follows a broad valley with extensively farmed bottomland. There are unspectacular views to distant, and often subdued, mountains.

Highway I-15: Boulder to Butte

General Description: I-15 climbs sharply out of Butte through drier aspen and open grassland, Rocky Mountain juniper and Douglas fir into moist pastureland surrounded by subdued mountains. There are major granitic rock outcrops on the west side of the summit. The Whitetail-Haystack Roadless Area (see Segment 9) lies to the east of the highway. From here, the road winds down through dense lodgepole pine forest back down into drier forest and grassland. Overall, there is little evidence of human intrusion but there is less traffic and more scenic variety on the alternate Highway 69.

Montana Highway 2: Whitehall to Butte

General Description: This route begins in low greasewood and sagebrush shrubbery and climbs through rocky conifer-dotted ridges into dense Douglas fir and lodgepole pine forest. The road follows a valley bottom and there are few vistas into surrounding mountains. The granite boulder field is not as spectacular as along I-90, the alternative to this route. Closer to Butte, there are some cutblocks, logging trucks, and there is extensive development of ranchettes.

U.S. Highways 12/287: Helena to Three Forks

General Description: U.S. 12 and 287 travel through a broad but fairly heavily impacted valley bottom with extensive irrigated hay meadows and cultivated fields. Natural vegetation consists of grassland and open Rocky Mountain juniper scrubland. Once extensive riparian woodlands near Townsend have been reduced to small patches in a matrix of cultivation or industrial development. The Missouri River south of Townsend has been classed as a blue-ribbon trout stream.

Secondary Route 359: Montana Highway 2 to U.S. Highway 287 (Jefferson Island to Pony)

General Description: From a mixture of cultivated bottomland and riparian woodland, this route climbs past rocky ridges with open grassland, sagebrush and dense to open conifer forests up onto a grassy benchland where there are superb views to the Tobacco Root Mountains. While there is minimal intrusion by human activities and there are some spectacular vistas along this segment, the alternate route through Lewis and Clark Caverns appears more natural, has a greater diversity of intriguing landscapes, and includes many of the scenes found along this segment. Significant cultural resources are located at Pony.

Interstate 90: Montana Highway 69 to Bozeman

General Description: With the exception of the intriguing ridges on Doherty Mountain (see description under Segment 9), I-90 occupies a broad valley which has extensive agricultural and urban development. There are important riparian habitats at the headwaters of the Missouri (see Segment 31) and some open grasslands with a scenic backdrop of rocky hills and mountains. Significant cultural resources are located in the vicinity of Three Forks. The Madison Buffalo Jump lies south of this segment.

U.S. Highway 191: Bozeman to U.S. Highway 287 Junction

General Description: U.S. 191 occupies a fairly confined valley along the Gallatin River. There is some sagebrush and riparian habitat but the valley is largely a diverse conifer (Engelmann spruce, Douglas fir, Ponderosa pine, lodgepole pine, Rocky Mountain juniper) forest interspersed with picturesque rock promontories and limited views to rugged high alpine wilderness. In Yellowstone National Park, the surrounding hills become subdued and there are wet meadows with spring and summer flower blooms. The middle portion of the Gallatin River is a blue-ribbon trout stream and there is access to the Lee Metcalf Wilderness (see Segment 9) and the Hyalite-Porcupine-Buffalo Horn area (see Segment 28) from this route. Major drawbacks of this route include the confined valley, and areas of moderate to intensive cottage development and heavy traffic and forest cutblocks such as at Big Sky. Significant cultural resources are not identified on this route.

U.S. Highways 287 and 41: Virginia City to Whitehall

General Description: This low elevation route quickly leaves the natural uplands and drops into the extensively farmed bottomland along the river valley north of Alder. The mountains to the west appear subdued while the Tobacco Root Mountains to the east have jagged peaks. Closer to Whitehall, there is some natural grassland and riparian habitat along the Jefferson River and there are extensive stands of mountain mahogany shrubbery along the distant valley slopes. The open pit mine is a fairly prominent but localized major disturbance. Significant cultural resources are located at Virginia and Nevada City.

LIST OF CONTACTS

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Tour Operators

Brennan Tours, Seattle, Washington
Brewster Tours, Banff, Alberta
Globus Gateway Tours, New York, New York
Jalpak Tours, Vancouver, British Columbia
Jonik Tours, Toronto, Ontario
Montana Leisure Inc., Kalispell, Montana
Universal Fun Finders, Calgary, Alberta
Wiebe Tours, Edmonton, Alberta

Associations

Alberta Motor Association
Alberta Recreational Vehicle Dealers Association
Alberta Travel Trailer Association
American Automobile Association
Blue Ridge Parkway Association
Canadian Automobile Association
Canadian Motor Home Association
Peace River Alaska Highway Tourist Association

Government Organizations

Alaska Department of Transport
Alaska Division of Tourism
Alberta Culture and Multiculturalism
Alberta Forestry, Lands and Wildlife
Alberta Recreation and Parks
Alberta Tourism
Alberta Transportation and Utilities
Calgary Regional Planning Commission
Canadian Parks Service
Canadian Parks Service, Atlantic Region
Cape Breton Highland National Park (Cabot Trail)
Customs Canada
Glacier National Park Headquarters
Kananaskis Country, Improvement District No. 5
Michigan Travel Bureau
Mississippi State Highway Department
Montana Bureau of Land Management
Montana Department of Fish, Wildlife & Parks

Montana Department of Highways
Montana State Parks
National Parks Service - Blue Ridge Parkway
New York State Department of Economic Development
New York State Department of Environmental Conservation
Nova Scotia Department of Transport
Nova Scotia Tourism
Oldman River Regional Planning Commission
Quebec Tourism
Statistics Canada, Tourism and Recreation Analyst
United States Customs
United States Forest Service
United States National Parks Service
West Michigan Travel Association
Yellowstone National Park

Clubs

National Goodsam Club

Other Contacts

Budget Rent-A-Car
Deutsche Touring GmbH - Europabus
German National Tourist Office
Go Vacations
Lake Superior Circle Tour
New York Seaway Trail Inc.
Pannell Kerr Forster, London, England
Pathfinder Vacations
Royal Tyrrell Museum of Palaeontology
University of Montana, Institute for Tourism and Recreation Research

LIST OF STAKEHOLDERS INFORMED AND CONTACTED

The following list represents those Stakeholders who expressed an interest in either being informed, or participating in the survey.

CANADA

Brewster Transportation & Tours
Town of Cochrane
Waterton Biosphere Assoc.
Capital Region, Alberta Municipal Affairs

Peigan Nation
Kananaskis Village Resort
Lodge at Kananaskis/Hotel Kananaskis
Banff/Lake Louise Chamber of Commerce
Kan-Alta Golf Management Ltd.
Waterton Advisory Committee
Bow Valley Naturalists
Town of Stavely/Stavely Community Tourism Action Plan Committee
Town of Pincher Creek Tourism Action Committee/Municipal District of Pincher Creek CTAP Committee
Westcastle Development Authority
Mt. View Pitch 'N' Put Golf Course
Tourism Industry Association of Alberta
Town of Pincher Creek
Town of Turner Valley
Trout Unlimited Canada
M.D. of Cardston Tourism Committee
Canadian Parks and Wilderness Society
Village of Coalhurst/Coalhurst Community Tourism Action Plan Committee
Alberta Wilderness Assoc.
Dr. Brent Ritchie
Blood Tribe Recreation
Southern Alberta Hostelling Assoc.
Blood Tribe Economic Development
Town of Fort Macleod/Tourist Action Committee
Municipality of Crowsnest Pass
Village of Longview/Longview Community Tourism Action Plan Committee
Don Tannas, M.L.A.
Pacific Western Transportation
The City of Calgary/Mayor's Office
Foothills Community Tourism Action Plan Committee/Municipal District of Foothills No. 31
Stoney Tribe - Goodstoney Band/Stoney Tribe - Goodstoney CTAP Committee
Professional Outfitters Assoc. of Alberta
Municipal District of Bighorn No. 8
Alberta Fish & Game Association
Greyhound Lines of Canada Ltd.
Town of Banff
Town of Magrath
Town of Canmore/Canmore Community Tourism Action Plan Committee
Town of Black Diamond
Alberta Fish & Game Association (Zone 2)
Waterton Natural History Association
Federation of Alberta Naturalists
Fred Bradley, M.L.A.

City of Lethbridge/Lethbridge CTAP Committee
Chinook Country Tourist Association
Town of Fort Macleod
Improvement District #5/Kananaskis Country
County of Lethbridge #26
Trail of the Great Bear Tourist Society
Sarcee Administration

UNITED STATES

Whitefish Area Chamber of Commerce
TW Recreational Services, Inc.
Campground Owners Assoc. of Montana
Bureau of Land Management
U.S.D.A. Forest Service - Northern Region
Helena Area Chamber of Commerce
Flathead Convention and Visitors Association
Russell Country, Inc.
Kalispell Area Chamber of Commerce
Confederated Salish and Kootenai Tribes
Deer Lodge Chamber of Commerce
Best Western War Bonnet Inn
Columbia Falls Chamber of Commerce
Outlaw Inn
Blackfeet Cultural Program
National Park Service
Montana Historical Society
National Park Service, Glacier National Park
Glacier Country (Tourism Region)
Bay Point Estates
Montana Chamber of Commerce
Great Falls Area Chamber of Commerce
Convention and Visitors Bureau, Great Falls
West Yellowstone Chamber of Commerce
Inspirata Americana
Montana Department of Fish, Wildlife & Parks
Missoula Convention & Visitors Bureau
Greater Yellowstone Coalition
Bureau of Land Management
Alliance for the Wild Rockies
State of Montana/Department of Highways
Trail of the Great Bear Tourist Society

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